



# PETS International

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MAY 2025



## GLOBAL GATHERING: THE SURGE OF PET FAIRS

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## A fair deal?

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# Power to the pet fair

Behind the official market figures that define industry performance worldwide, there is a tangible and dynamic space where the real pulse of the sector can be felt – pet fairs.

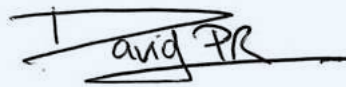
As we head to Zoomark this May, we take a closer look at the impact of these events on both exhibitors and visitors. While they undoubtedly serve as a platform for identifying trends, they are also a powerful place for business development and an effective means of forging new partnerships.

I would like to thank everyone who responded to our recent survey on how pet shows are shaping the industry. A key takeaway is that, as with most things in life, one visit is not usually enough.

According to our findings, 31% of exhibitors acknowledge that a strong return on investment often requires returning more than once.

Whether this is your first time in Bologna or you are a regular attendee, I wish you a successful and rewarding experience. Don't forget to stop by our booth in Hall 21, Booth B08.

Wishing you an inspiring read,



David Palacios Rubio  
Editor-in-Chief



*It is with great sadness that we learned of the sudden death of Julia Klischies, long-time head of product development at Pets Nature, business partner of Amelie Krause at Fellicita and valued contributor to PETS International. We would like to extend our sincerest condolences to all Julia's family, friends and colleagues.*

## “A goal without a plan is just a wish.”

ANTOINE DE SAINT-EXUPÉRY, FRENCH WRITER AND AVIATOR



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### Latest APPA report provides positive update for US pet industry

The American Pet Products Association (APPA) has released its 2025 State of the Industry Report, which highlights the pet sector's continued growth and resiliency. Total US pet industry expenditures reached \$152 billion (€140.6B) in 2024 and \$157 billion (€145.2B) in sales is projected for 2025.

Pet ownership seems to have regained momentum with 94 million US households owning at least 1 pet, compared to 82 million in 2023. Ownership has gone up for both dogs and cats, with 51% of US households having a dog and 37% a cat.

Perhaps as a consequence of rising egg prices, keeping backyard chickens is becoming increasingly popular with 11 million US households now owning chickens (a 28% rise from 2023).

### New report spotlights pet trends in Spain and Portugal

According to a survey published by the Spanish Pet Industry Association (AEDPAC) and conducted by Hamilton Global Intelligence among 709 Spanish and 704 Portuguese pet owners between 18 and 65, having children later in life and smaller households may be driving a rise in pet humanization.

The report, presented during the Iberzoo Propet 2025 in Madrid, concludes that 52% of Spanish households own at least 1 pet, up from 49% last year. In Portugal, 58% of households own a pet. Single-person households comprise 28% of homes in Spain and 25% in Portugal, up from 13% and 14% in 1991. Couples with no children also make up a slightly higher proportion of the population.

### Industry reacts as tax reform in Brazil leaves out pet food

The Brazilian government has sanctioned a new tax model, but despite tax reductions for essential goods and services ranging from 0 to 60%, President Luiz Inácio Lula da Silva's administration didn't include pet supplies on the list.

"The result is far from ideal for the sector," José Edson Galvão de França, Executive President of pet industry body Abinpet, tells PETS International. "The tax reform brought a reduction in the burden for some products that are raw materials for animal feed, such as animal proteins, and some items that are part of the Brazilian basic food basket, such as cereals," adding that it "did not include the value-added products produced by us".







### TNC buys BAF Petfood as expansion gathers pace

Swedish natural pet food and the supplement supplier The Nutriment Company (TNC) has acquired German raw pet food factory BAF Petfood. The move marks TNC's fourth investment of 2025 and is part of its strategy to expand premium pet food production across Europe.

As a former subsidiary of Fressnapf, BAF Petfood operates from a 9,000 sq m facility in Thalmässing, 55 km south of Nuremberg. Through the deal, TNC will be able to boost its production capacity and gain access to Fressnapf's retail network, including both company-owned and franchise stores.

### Snellman moves to increase capacity with new factory

Finnish meat company the Snellman Group, owners of raw dog food brands MUSH, Fodax and Raw for Paw, has applied to the country's government to build a new factory in Pedersöre, 460 km north of Helsinki.

The Jakobstad-based group plans to relocate its raw pet food production from 1 of its 2 current facilities. Magnus Pettersson, Director of Snellman Petfood, says the new plant would replace a "cramped" facility and increase production capacity from 150 tonnes of frozen food per week to 250 tonnes.

"The new factory would be a significant step in implementing the growth strategy of Snellman's pet food business and for our commitment to natural raw pet food and the wellbeing of pets," Pettersson says.



### New Zealand: declining pet numbers suggest barriers to ownership

The number of New Zealand households with dogs and cats has gone down, according to a survey of 2,058 people by charity group Companion Animals New Zealand and Insights HQ.

It is believed that 4 out of 10 households in the country had at least 1 cat, and that 31% owned a dog last year. In 2020, those numbers were 41% and 34%, respectively.

According to the survey, 37% of Kiwis have no pets, and 15% neither have a pet nor want one.

The largest factor deterring people from getting a pet was the perceived time needed, cited by 49% of those asked, up from 34% in 2020. A close second was cost, with 48% saying they this was a reason for not getting a pet, up from 38% in 2020. Perceptions of pets as being "too much responsibility" also increased – 36% cite this as a reason, up from 28% in 2020.



### Das Futterhaus launches online shop

German pet retailer Das Futterhaus announced the launch of its e-commerce website on 3 March. The German and Austrian online stores make around 5,000 pet products available for delivery to shoppers. Das Futterhaus says its bricks-and-mortar locations will remain central, but the omnichannel strategy will help improve its market position.

The company recently posted its first-ever decline in sales, and the online shop could help reverse the downward trend. The pet retailer also recently digitized its customer loyalty card as part of its modernization strategy.



### South Korea actions new import regulations for pet food

The South Korean Ministry of Agriculture, Food and Rural Affairs (MAFRA) announced new sanitary condition requirements in January.

Ingredient and pet food manufacturers must now undergo inspection by the governments of the exporting countries to ensure compliance with South Korea's rules. The regulation also outlines label requirements for traded goods.

This will open the market to more beef ruminant ingredients, which had been restricted for decades after bovine spongiform encephalopathy (BSE) scares.

However, there are still outlines, including cooking and sterilization requirements, for various food ingredients from areas with specific disease outbreaks.

One listed outbreak that could impact foods' ability to be sold in Korea is the highly pathogenic avian influenza (HPAI), which is spreading through farms in much of the US.

Data from the US Department of Agriculture (USDA) showed that South Korean pet food imports declined in 2023 by 11.4% year on year (YoY) to \$307 million (€276M).

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### Italian tech player Nital enters the pet market

Turin-based Nital, which distributes cameras, robot vacuums and drones, is adding pet tech company Neakasa to its portfolio.

The Hong Kong company produces the M1 automated litterboxes and the P0 Pro, a 5-in-1 grooming vacuum kit. Both will be distributed in Italy by Nital.

The M1 is competing directly with US-based Whisker's Litter-Robot, which recently launched a European website.

In a press release, Nital Product Manager Giorgia Cristofaletti says that the company has chosen to move forward with Neakasa's products due to their quality and reliability and cites strong growth in Italy's pet market.





## PET INDUSTRY FACT FILE



was the average monthly budget for pets in France in 2024, according to the association Promojardin-Promanimal.

### NEW APPOINTMENTS

## Mars Petcare

The multinational has appointed Deri Watkins and Paolo Rigamonti as Regional Presidents for Pet Nutrition in Developed Asia Pacific (APAC) and Europe respectively.

## Independence Pet Holdings

The US pet health brand has appointed Munir Hafez as Chief Technology Officer (CTO).

## Hill's Pet Nutrition

Current Chief Veterinary Officer Karen Shenoy has been promoted to Vice President and Chief Veterinarian for EMEA (Europe, Middle East and Africa).

### TOP 3 INVESTMENTS



Spanish meat casings manufacturer **Viscofan** has acquired a 51% majority stake in Brazilian pet treat maker Pet Mania for €5.6 million (\$5.8m).



Insect farming player **Protix** has secured €1 million (\$1.1M) from public-private financial institution Invest International.



Pet supplement producer **Swedencare** has acquired 100% of the shares of UK-based Summit Veterinary Pharmaceuticals for £30 million (\$39M/€36M).

### TOP WEB NEWS

## Fressnapf's new marketing strategy

The German retailer has brought in marketing agency, Grey, to lead its strategy of brand growth and omnichannel expansion.

LATEST  
NEWS







The power of connection

# Why trade shows are essential for the industry

As the pet sector continues to make advances globally, pet-focused trade events have grown in size and number, offering networking and educational opportunities alongside trend updates and local market insight.



**Paula Flores**  
Contributor  
*PETS International*

Trade shows provide opportunities to enhance sales, generate leads and boost brand visibility. While attending as a visitor usually represents a low investment, participation as an exhibitor is a more costly choice.

## Attendance: be clear on purpose

It is, therefore, important for an exhibiting company to be clear about why it wants to participate and what it hopes to achieve by attending a specific event.

"Before deciding on a large trade show, think about what you want to achieve. Are you looking for new clients, networking or brand exposure? If your goals don't align with the show's offerings or audience, it may not be the best fit," says Andrea Terrile, Head of European Sales at Thai pet food business Perfect Companion Group.

## Putting your company out there

Paul van der Raad, CEO at Swedish pet nutrition firm Petbuddy Group, points out that the purpose might vary according to the show. "The same company will have a different position in different markets – it might be a leader in a market, but in another, it may just be trying to establish itself," he says.

Safa Mikha, Head of International Sales at high-end German pet food and supplements maker Dr.Clauder, recognizes the importance of the opportunity to

showcase a brand: "Shows and exhibitions give us a chance to expand our network with new customers who are aware about Dr.Clauder but haven't had the chance to get in touch with us directly."

Jerome Details, Commercial Manager at European packaging manufacturer Coveris Group, says that as the first such company to exhibit at Interzoo, taking part in a trade show was fundamental as "potential customers can really see our company, the staff's knowledge and have a real sense of all the solutions we can offer". He continues that a trade show "is an important step in getting new clients. It is that initial contact that gets followed up and then turns into business".

From a different perspective, Marcel Blok, CEO at pet industry consultants Change Stranamics, says that shows "are the place to be seen". This means that even if from a business point of view the decision is challenging, companies feel compelled to participate, as "they do not want to be seen as a company who cannot afford to be there".

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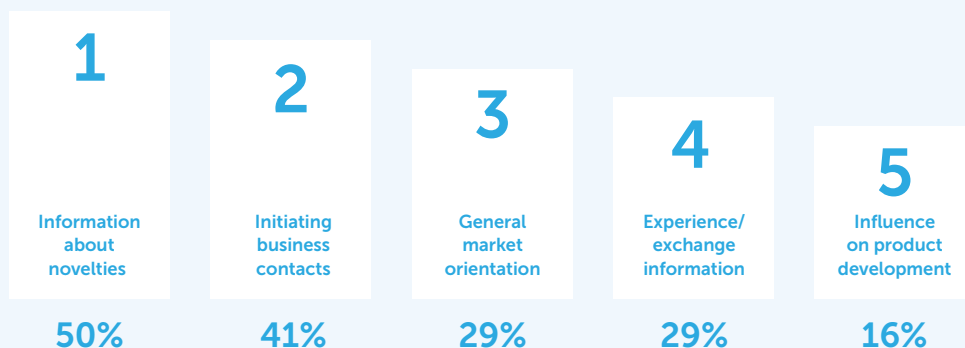
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## Top 5 reasons for attending Interzoo 2024\*



Source: WZF Show Report Interzoo 2024 \*Multiple answers possible

### Long-term catalysts

For brands and manufacturers looking to break into new markets, trade shows provide an opportunity to assess market dynamics and local demand, as well as establish key contacts and gain firsthand insights into regional consumer behaviors. According to results of a survey of visitors to Interzoo 2024, more than 4 out of 10 (41%) cited initiating business contact as a key reason for attending the event in Nuremberg.

The strategic value of these events goes well beyond immediate sales – they provide inside knowledge and a fuller picture of a market. “The ability to meet multiple potential clients in one venue significantly reduces logistical challenges and costs, making trade shows a highly efficient market entry strategy,” says Lluç Ferrer, Export and Private Label Manager at Spanish pharmaceutical company Cantabria Labs.

Van der Raad emphasizes that attending a trade show can be part of an entry strategy but not your ticket in: “There is also the need to understand the market, the legislation, the partnering – and all that happens beforehand.”

For players looking to expand globally, presence at these events is often seen as essential. “If you want to expand internationally, you need to be there, you need to be seen,” says van der Raad. The Interzoo survey also found that 97% of exhibitors were able to establish new business relationships, and 93% said they expected follow-up business due to trade fair contacts.

### Measuring results

Traditionally, the success of trade shows is based on Return on Investment (ROI), i.e. performance metrics such as leads generated, market insights gained and the number of strategic partnerships formed.

Yet, the benefits of participating at a trade show go beyond pure metrics. Bloc goes further stating that “it doesn’t make sense to look for quantification”. Van der Raad also believes it is not all about ROI.

“It is not just buying and selling, it is knowledge, it is about networking and sharing knowledge about relevant topics,” he says. In fact, more than 9 out of 10 participants in 2024’s Interzoo were decision-makers or involved in purchasing and procurement decisions.

Pet fairs also provide a crucial platform for visibility and credibility, allowing companies to build relationships. Moreover, in many markets, there is the cultural aspect. “In Spanish and Latin American cultures, people need to know who they are dealing with – the face-to-face contact is fundamental,” adds Ferrer.

Plus, there are advantages across the whole supply chain. “For businesses involved in private label manufacturing, trade shows provide a crucial platform for connecting with large-scale retailers seeking exclusive pet product lines. Private label production requires significant volume commitments, making trade shows an essential environment for securing long-term contracts,” concludes Ferrer.

► SEE NEXT PAGE

## Expanding world of trade shows

Marking its 38th year, Interzoo 2024 welcomed over 37,000 industry professionals from 140 countries, a 32% increase. In Spain, Iberzoo Propet 2025 saw an increase of 33% in visitors to more than 21,600 when it took place in February in Madrid.

In the US, March's Global Pet Expo 2025 in Orlando, Florida, featured over 1,100 companies exhibiting across more than 3,400 booths, attracting more than 21,000 pet industry professionals. Reflecting the dynamism of the Chinese pet market, Pet Fair Asia, in Shanghai, is now its 27th year. In 2024, it featured over 2,500 exhibitors, attracting a record-breaking 124,000 attendees from 91 countries (a 41.8% increase).

Next to the big events, smaller-scale regional events are providing pet players with the opportunity to get to know their target markets. Events such as Interpets Asia Pacific (Japan) and Pet Fair South East Asia (Thailand) provide localized industry insights and tailored business opportunities.

For example, last year's Pet South America held in São Paulo, Brazil, reported R\$11.5 million (\$2M/€1.8M) in business transactions.

New trade shows are also adding to the existing offer because of growing demand in emerging markets. Pet Fair Vietnam, now in its second year, has already attracted 12,000 visitors. In China, a new exhibition in Guangzhou, Pet Sourcing Fair China, has been highly rated by professionals as a place to network.

## Visibility and engagement

For companies wishing to expand their footprint to new markets, a combination of global and regional trade shows ensures both broad visibility and localized engagement. They also mean higher quality interactions and, in most cases, lower costs to attend as an exhibitor.

Ferrer comments that when trying to expand into Eastern Europe, attending regional events helps to establish credibility before transitioning to larger, global exhibitions. "Smaller, more focused trade shows or industry-specific events can sometimes provide better opportunities," agrees Perfect Companion Group's Terrile.

According to the Interzoo survey, 29% of visitors were looking for a general market orientation. An additional 10% attended the event to observe what their competitors were doing.

For consultants in the industry the reality is no different – attending local shows is key. Miguel Angel Lopez, consultant and pet food advisor in the Mexican market, shares how he has "witnessed the sale of complete equipment lines, supplier changes, the introduction of new technology and additives, and the discovery of new supply options at each and every trade show".

## Forums for advancing change

Sustainability has undoubtedly become a major focus in the pet industry, and trade shows are proving to be invaluable in advancing these initiatives.

Jim Lamancusa, CEO and Executive Director of the Pet Sustainability Coalition (PSC), highlights how collaboration at trade shows fosters meaningful discussions and drives collective action. The ability to engage directly with brands, retailers and stakeholders makes these events a powerful tool for sustainability education and innovation.

Many trade shows have reflected this shift toward environmental responsibility. At Zoomark, the PSC has recently agreed a collaboration to develop the Green Mark designation system that reflects the industry's shift toward transparency and accountability.

"By providing a standardized way to identify brands with meaningful sustainability efforts, PSC is helping businesses cut through greenwashing and connect with genuinely responsible companies," says Lamancusa. "These developments underscore how trade shows are not just showcasing sustainability but actively shaping industry-wide practices."

## Trade shows keep on evolving

For anyone who has attended shows repeatedly, their evolution is clear – they have grown with the industry, particularly in what they offer. "Taking Interzoo – now it encompasses the whole supply chain, from machinery, packaging and ingredients to manufacturers and brands, to retailers to distributors, but 20 years back it was mostly about brands meeting retailers," says Petbuddy Group's van der Raad.



Leading trade shows have also expanded their offerings to include new products, educational sessions, forecasting and whole zones dedicated to emerging trends and helping businesses align with the latest industry shifts.

This year's Zoomark has debuted a hub for startups and 3 thematic routes. "Attending the educational sessions has opened doors for future collaborations, product innovation and increased visibility in competitive markets," comments Terrile.

### How big is too big?

This evolution also translates into more space to fit new hopefuls entering the pet market. Interzoo introduced an extra hall in 2024 and this year's Zoomark has also added a new area and now totals 10 halls and 78,000 sq m.

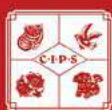
Pet Fair Asia spanned 300,000 sq m at its last event and, according to a post-show report, more than 93% of attendees came away satisfied.

***In a survey of visitors to Interzoo 2024, more than 4 out of 10 (41%) cited initiating business contact as a key reason for attending the event.***

One of the ongoing discussions within the industry relates to this increase. How much larger can trade shows grow? Pet industry leaders express a range of views. Lopez tells us: "If they are large, then I plan the visit with a list of clients," while Ferrer says that "when there are so many people in a single hall, the intensity of the contact diminishes".

As trade shows keep on integrating more educational initiatives, market trend sessions, partnerships, training and networking, the shift towards knowledge-sharing, innovation and fostering long-term industry growth is clear. After all, trade shows are not just about today's business, they shape the industry's future. ♦

*Images: Interzoo 2024 (WZF, Thomas Geiger) / Zoomark 2023*



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## Research reveals top pet fair priorities for exhibitors and visitors

A PETS International survey finds that participation in major trade shows is a vital part of the strategies of both suppliers and retailers operating in the global pet industry, but reveals concerns around cost and return on investment.



**Steve Randall**  
News Reporter  
GlobalPETS

More than half of respondents (56%) to the PETS International survey were exhibitors with visitors accounting for the rest (44%). The leading reason for exhibitors to attend trade shows was given as finding potential new partners (70%), while a smaller cohort value the chance to meet existing partners (17%).

### Exhibitor perspectives

The effectiveness of trade shows, as an exhibitor, for finding new partners is clear with 54% of respondents saying this, however 41% said it can be while adding “but...”. Just 5% said exhibiting at trade shows was not effective for finding new partners.

While the big trade shows including Zoomark International, Global Pet Expo and SuperZoo are high on the agenda of events to attend, 44% of exhibitors will take part in an average of 2-4 trade shows in 2025, more than one fifth are exhibiting at just 1 show, and 23% plan to exhibit at 5 or more.

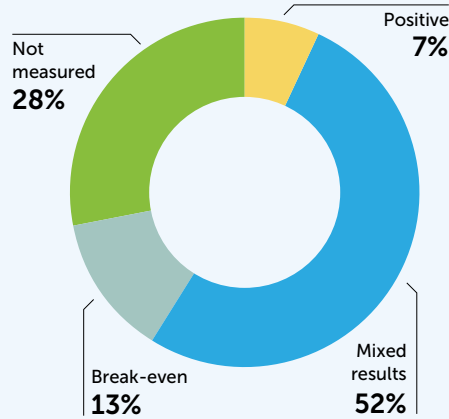
However, the previous 2 years saw a greater share taking part in more shows with 58% of respondents having exhibited at 2-4 shows in 2024 and 55% exhibiting at 2-4 shows in 2023. Responses were split almost evenly between those who intend to be at more shows over the next couple of years, fewer shows or are unsure.

As 65% of respondents said shows are too expensive and 31% said they are expensive but worth it, cost is likely a factor in decisions to attend fewer shows.

[▶ SEE NEXT PAGE](#)



## The ROI of trade shows for exhibitors in the past 2 years



Source: PETS International industry survey, March 2025

52% of those who had exhibited at a trade show over the past 2 years said they saw a return on their investment (ROI) "at some shows" compared to just 7% who said this of all shows they attended, while 13% more or less broke even. A further 28% do not measure ROI of exhibiting at trade shows.

### Best for exhibiting

Europe was the top destination for exhibitors in 2024 and 2025, with 78% of respondents attending events in the region. North America (53%) and Asia (28%) followed.

Interzoo in Germany was by far the most important trade show in Europe, as cited by 74% of respondents

compared to just 6.5% for Zoomark, while 19.5% were unsure. Global Pet Expo was the top choice for North America (49%) followed by SuperZoo (19%), although 32% said they were unsure.

Trade shows in the Middle East and South America were (or will be) attended by 10% each. Multiple answers were allowed for this question.

52% of exhibiting respondents said they weren't sure which trade show in Asia was the most important, with China International Pet Show (CIPS) taking an 18% share, Pet Fair Asia (China) 11% and Pet Fair SEA (Thailand) 10%.

The highest single percentages of poll participants felt that shows in Europe (42%) and North America (30%) were about the right size, although a sizeable minority feel that there are too many exhibitors (32% for Europe and 20% for North America).

Almost 2 in 10 felt there were not enough visitors to shows, across both regions, with 45% having noticed a decrease in visitor numbers since COVID. However, almost a quarter said they thought visitor numbers were higher since the pandemic.

Other observations on the post-COVID era suggest new shows popping up (20%) and that many shows have attracted more exhibitors (18%).

### Visitor views

For those who attend trade shows as visitors, while finding potential new partners ranks at 24%, discovering new products and trends in the industry (35%) was also noted.

Just over half of visitors responding to the PETS International survey said they will attend an average of 2-4 shows in 2025, almost 3 in 10 said 1 show, and 8% will attend 5 or more. While 61% attended 2-4 shows in 2024, this figure was 53% in 2023.

***46% of visitors said that not having enough time to do everything they want was the most challenging aspect of attending a trade show.***



**More than half of exhibiting respondents said they didn't know which trade show in Asia was the most important.**

7 in 10 respondents said the shows they visited in 2024 and 2025 were/would be in Europe, 41% said North America, 28% said Asia, 8% said the Middle East, and 4% said South America.

As with exhibitors, Interzoo (70%) and Global Pet Expo (45%) and CIPS (22%) were named as the most important for visitors in Europe, North America and Asia respectively, but also as with exhibitors, a large share said they did not know.

46% of visitors said that not having enough time to do everything they want was the most challenging aspect of attending a trade show with 16% citing the time it takes to walk from one hall to another.

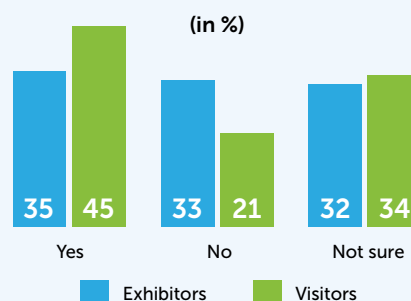
That said, most respondents (48% for European shows and 36% for US) said they considered trade shows to be about the right size.

Difficulty in finding the most innovative and interesting products was another common challenge (18%).

More than twice as many visitors said they will attend more trade shows in the next 2 years (45%) than said they would not (21%). One third were not sure. ♦



### Will you participate in more trade shows in the future?



Source: PETS International industry survey, March 2025

*Methodology: The survey was conducted online in March 2025 among 220 industry participants, including manufacturers (56%), retailers (13%), suppliers (12%) and distributors (10%).*

*Their companies ranged from those with annual revenue of less than €1 million (25%), €1-10 million (29%), €10-100 million (31%) and €100+ million (14%).*

*Images: Interzoo 2024 (WZF, Thomas Geiger) / Pet Fair Asia 2024*



### Want to dive deeper into the results?

Download the 'Pet Industry Tradeshows Report 2025' here:  
[globalpetindustry.com/tradeshows](https://globalpetindustry.com/tradeshows)





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**Pet Fair Asia, Asia's largest pet exhibition, returns in 2025 with another robust edition. Let's find out what's new.**

### A record-breaking 2024 edition

In 2024, Pet Fair Asia attracted over 2,500 exhibitors and more than 124,000 trade visitors from 91 countries. A standout achievement was the 41.8% surge in international attendance. For the first time, attendees from abroad accounted for 10% of the total trade visitors, making the event more international than ever before.

Known for unveiling cutting-edge innovations and highlighting emerging trends in Asian consumer behavior, the exhibition reaffirmed its status as the leading business-to-business-to-consumer (B2B2C) platform for the pet industry. The final 2 days welcomed 300,000+ pet enthusiasts, giving international brands an exclusive opportunity to engage directly with consumers and boost brand awareness in one of the world's most dynamic pet markets.

### What to expect in 2025

Following the 2024 success, Pet Fair Asia will return with 2 targeted co-located events, designed to cover even more aspects of the industry. Pet Fair Asia SUPPLY, featuring 600 exhibitors, will showcase the latest innovations in pet product manufacturing, raw materials and supply chain solutions.

Meanwhile, Pet Fair Veterinary, covering 30,000 sq m, will bring together over 700 brands specializing in pet healthcare, veterinary equipment and medical solutions, offering a comprehensive look at advancements in pet medicine.

### Pet Fair Asia Network

Pet Fair Asia is the flagship event of the Pet Fair Asia Network, a portfolio of industry-leading exhibitions that includes Pet Fair Beijing, Pet Fair South China (Shenzhen) and Pet Fair Southeast Asia (Bangkok).

This network serves as a strategic platform for businesses looking to tap into the fast-growing Asian pet market, providing targeted opportunities to connect with local partners and consumers.

### Market potential

For 27 years, Pet Fair Asia has reflected the rapid growth of China's pet market, which was valued at approximately ¥300 billion (\$42B/€39B) in 2024.

According to the Blue Book of the Pet Industry by Asia Pet Alliance (APA), spending on pet products in China grew by 5.5% over the year, surpassing the global average despite a slowdown compared to the last decade.

Growth in the sector is primarily driven by rising pet ownership in lower-tier cities, fueled by ongoing urbanization and increasing disposable income. With only 23% of China's total population currently owning a pet, there remains significant untapped potential for international companies looking to enter or expand in this thriving market. ♦

**For more information visit**  
[petfairasia.com](https://petfairasia.com)



# Tariffs and trade wars Pet businesses struggle to predict the future

As moves by the US have led to trade barriers being put into effect and corporations facing the possibility of long-term tariffs, stocks have tumbled and earnings calls soured. PETS International considers the impact on the pet industry.



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

The current environment of escalating tariffs, as well as the uncertainty surrounding the Trump administration's ever-changing approach to levies, are weighing heavily on the global economy – with both large and small pet companies already feeling the repercussions.

## Implications for small business

Expansion to the United States has always been the natural next step for Healthybud, a small Quebec-based pet food brand. Like many Canadian companies, Healthybud found that shared language and culture – plus relatively free and easy trade – has made the market transition into the US simple and profitable.

Now, with the nations' leaders levying heavy tariffs, Healthybud CEO Kyle Feigenbaum is struggling to find a path to maintain the company's operations in either country. "We can't plan," he tells PETS International. "I can't start problem solving because I don't know what's going to happen in a month."

Healthybud produces and sells freeze-dried pet food on both sides of the border. Tariffs introduced by the US under President Donald Trump have eaten into the company's margins and forced Feigenbaum to question its production process and even the product itself.

He says he can temporarily cover the cost of the tariff levied by the US without raising prices, but if the trade war continues, he may need to pull manufacturing out of the US, scale back operations or even shut down entirely.

## Latest wave of tariffs

"Small business owners, we're tough," Feigenbaum says. "We've been through a lot, and if you give us a problem, we will find a way to fix it. If you give us a potential problem without a finish line in sight, what can we do?"

On 4 March, President Trump dealt allies and adversaries alike a heavy blow, levying 25% tariffs on Canadian and Mexican goods. Tariffs on goods traded under the United States-Mexico-Canada Agreement (USMCA) free trade agreement – pet food included – were then delayed until 2 April.

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As of 2 April, which Trump dubbed 'Liberation Day', a raft of new tariffs was introduced with a 10% baseline introduced on 5 April. In addition, reciprocal rates were announced to take effect from 9 April.

For Chinese imports, the blanket tariff was set at 34% – so is effectively now 54% given the previous 20% levies – with the European Union facing tariffs of 20% on all goods. Serbia at 37%, Thailand at 36%, India at 27% and South Korea at 25% are also heavily hit, while the UK, Brazil, Australia and Saudi Arabia emerged with just the 10% imposition.

However, rather than the proposed levies – the prospect of which had sent stock markets plummeting around the world – coming into force on 9 April, there was yet another twist as Trump announced a 90-day pause on most of the higher tariffs and reverted to 10% instead. Across industries, businesses and investors scrambled to prepare for various possibilities, ranging from a brief levy used as a negotiating tactic to a long, drawn-out trade war that could cause massive disruption to the global economy and create a new wave of inflation.

### Targeted economies react

Canada quickly slapped reciprocal tariffs on the United States, including 25% levies on imports of many American food products, which may impact pet food industrial inputs. The country retaliated to the steel and aluminum tariffs with new duties on about \$20 billion (€18.5B) of US goods. The two countries have agreed to new trade talks, but even after Trump delayed many tariffs on Canada, the government did not immediately remove its retaliatory charges. More tariffs are possible in the weeks and months to come.

China responded with reciprocal tariffs of up to 15% duties on US agricultural and food imports such as chicken and pork, which went into effect on 10 March, and, at the time of writing, is imposing tit-for-tat levies as Trump raised tariffs on China again on 9 April to 125%. Mexico did not immediately announce details of its retaliatory plan.

The EU responded to metals duties by proposing tariffs on \$28 billion (€26B) of US goods, but has delayed the implementation of some of those tariffs until mid-April to allow time for a "mutually agreeable solution" to be found, according to EU trade chief Maroš Šefčovič.

The American Feed Industry Association (AFIA) had pushed the administration to limit its tariffs, particularly on animal food ingredients that are not produced in the US. After tariffs went into effect, the body representing the feed industry in the US encouraged dialogue between countries to avoid harming the agricultural industries that form the base of the pet and animal food industry.

"When shocks are introduced into the global supply chain, it makes it harder for domestic manufacturers to keep feed and pet food costs low for farmers, ranchers and pet owners, and has the dual threat of jeopardizing the supply of vital animal nutrition ingredients that may only be produced overseas," AFIA President Constance Cullman said.

The group has taken a cautious approach to communicating with the notoriously fickle administration and has declined to oppose specific tariffs as of 7 March.

### Industry advocates express concern

The Washington DC-based Pet Food Institute (PFI) released a statement expressing concern over retaliatory tariffs but also stopped short of condemning the Trump administration's trade moves. "US pet food manufacturers stimulate the country's overall agricultural and rural economies through the purchase of ingredients, labor and services from related industries," said Dana Brooks, President and CEO of the PFI.

"We are concerned that retaliatory tariffs could have severe supply chain impacts that affect the availability of our products. To be clear, we are in favor of policies that support domestic manufacture and the global distribution of safe, quality pet food, that provide for consumer choice and help dogs and cats live long, healthy lives."

### Obstacles to business

Mike Bober, President and CEO of the Pet Advocacy Network released a more directly oppositional statement in March. "We all support efforts to strengthen and grow our countries' respective economies, but imposing steep, broad tariffs on one of our best and closest trade partners will hurt the pet care community and millions of pet owners," he said.

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The Pet Food Association of Canada (PFAC) echoed business owners like Healthybud's Feigenbaum. Chris Nash, PFAC's Executive Director, said the uncertainty of the situation was making it "incredibly challenging for any business to properly operate".

"For now, we continue to advocate for members with government, identifying key and critical ingredients sourced from the US that are not easily replaced in Canada or elsewhere, in preparation for future tariffs and trying to minimize the impact that US-imposed and retaliatory tariffs will have," he said.

### Billions worth of pet food affected

The US imported 313.6 million kg of dog and cat food in 2023, according to World Bank data. 94.5 million kg of that came from Canada, worth \$407 million. 21.4 million kg came from China, while 12.7 million kg were imported from Mexico.

Together, the 3 countries accounted for roughly 41% of the country's pet food imports. All of those imports will now have additional costs attached to them.

But the costs will be much more severe in Mexico and Canada. The latter, a much smaller country than the US by population, imported 419.5 million kg of pet food in 2023. 396.1 million kg of that, or 94%, was from the US.

Mexico imports much less pet food. But of the 89.2 million kg it imported in 2023, 98% of it came from the US. China imported 86.9 kg of pet food in 2023, and 59.6 million kg came from the States. That's 68.6% of its imports.

These numbers hint at only the direct impact of tariffs on pet food. As input goods are also being tariffed, production prices and, ultimately, consumer prices, are likely to rise throughout the sector.

### Uncertainty in Europe

Trump's tariff on EU goods has naturally sparked major concern on the continent. Dutch bank Rabobank estimated that agriculture may see the greatest impacts.

In a report, the bank said that shifting costs to US importers, reducing prices for competition reasons, withdrawing from the US, bypassing tariffs with new



supply chains or investing in US production could help avert new costs. "The best option for a given company depends on a number of factors, including the price demand elasticity of its products and its international footprint," the bank said.

The EU imported 18.1 million kg of dog and cat food from the US in 2023, per the World Bank.

Europe's pet food industry may be more insulated from indirect impacts of tariffs, as the continent's agricultural sector is largely independent of the US. Moreover, 25% tariffs on some European agricultural products entering the US are already in effect, possibly limiting the shock of new barriers on goods crossing the Atlantic.

### Corporate projections on hold

In the months leading up to Trump's first major levies, many large corporations hosted their 2024 fiscal year earnings calls, where companies traditionally outline their expectations for the coming year. In the face of the erratic nature of the situation, some disregarded the possibility of tariffs in their guidance.

Swiss-based multinational Nestlé, which owns Purina, was one such company. At a recent earnings call, CFO Anna Manz said the company's guidance would not anticipate any new trade barriers or major shifts in exchange rates during what was "clearly a particularly uncertain period". The company produces significant amounts of pet food in Mexico.

At the Consumer Analyst Group of New York (CAGNY), General Mills' CEO Jeff Harmening said it was "a volatile couple of months" and that, while the company is largely insulated from tariffs, aluminum and steel tariffs could impact the price of canned pet food.

***As his country is faced with an  
unwinnable trade war, Healthybud's  
Feigenbaum wants Canada to cut a deal  
and save businesses like his.***

Even Pet Valu, a Canadian pet food retailer and franchise that imports 15% of its goods from the US, assumed no major trade policy changes when calculating its projections.

Speaking at an earnings call just hours after the tariffs on Canada were levied, CEO Richard Maltzbarger said the company was watching the situation. "As a proud Canadian company with deep roots here and locally owned businesses with over 350 owners, this is a specific topic we're paying a lot of attention to," he said.

If tariffs persist, many companies may have to adjust their expectations accordingly.

### **Small businesses hardest hit**

Healthybud moves products in both directions across the US/Canada border, with much of the company's production based in the US.

Feigenbaum says that as a relatively small company, his ability to resist new costs is limited. After the US tariffs on Canada and Canada's first round of retaliatory tariffs went into effect, he said he was able to cover the cost temporarily.

The strength of the US dollar against the Canadian dollar means that the company's margins are larger in the US. However, if the tariffs last, he said he may need to raise prices in the States.

The fear of more retaliatory tariffs looms even larger, however. If forced to pay a 25% tariff on goods moving from the US into Canada, it could eliminate his profit margin in Canada. Feigenbaum said he has looked into moving his production from the US into Canada to avoid that fee. However, limited capacity for freeze-dried pet food production exists.

As of early March, retaliatory tariffs were popular in Canada. Feigenbaum chalks this up to an emotional response to Trump. He's lobbying Canadian MPs against retaliatory tariffs. "I believe Canadians need their leaders to step up to be able to go to Washington and be able to negotiate a good deal, and that is the only outcome that's going to work," he says. "Otherwise, the Canadian economy is going to be decimated, and it's going to kill small businesses."

As his country is faced with an unwinnable trade war, Feigenbaum wants Canada to cut a deal and save businesses like his. "It's like a fight between a little brother and a big brother, and the little brother can be tough, but eventually everyone knows what's going to happen," he says.

If pet food is hit with a retaliatory tariff, Feigenbaum says production may be paused and a new product may need to be developed. To continue operating as a freeze-dried pet food company in Canada under that scenario would require a steep price hike that he's "confident" Canadian consumers would not support.

### **Some stand to benefit – for now**

While many suspect that high tariffs and uncertainty around trade could spark a larger economic downturn, some companies are set up for success in the new trade environment – at least for now.

Ontario-based PetsCool primarily bills itself as a grooming and boarding service company. The supplies and products in its limited retail selection are largely sourced within Canada, protecting the company from the direct impacts of tariffs.

"Since day one, PetsCool has focused on creating a resilient supply chain," CEO Lin Zhang says. "Unlike many businesses that rely on international imports, we source 95% of our supplies from Ontario, Canada. This decision has helped us minimize exposure to tariff-related price fluctuations, ensuring stable operations even in uncertain times."

"Markets shift, and challenges come and go, but resilient entrepreneurs build stronger businesses," she said in a LinkedIn post decorated with an AI-generated image of a golden retriever raising a paw patriotically in front of a Canadian flag.

But even she admits that there will be headwinds posed by the trade barrier, including consumer spending declines and ripple effects from supply chain disruptions. ♦





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Country report: Italy

## Pet-loving nation that is value-driven and eco-conscious



There are growing numbers of dogs and especially cats in the Mediterranean country, as established independent pet shops rely on their high levels of service to compete with chains, e-commerce and private label.



**Rita Buffagni**  
*Mediatic*



**Lavinia Fressura**  
*Mediatic*

Pet consumers in Italy purchase products in all available channels. Although they still prefer bricks and mortar, online shopping has increased significantly. Millennials and Gen Z tend to search for products on websites and read reviews from other pet owners before buying either online or at a physical location.

### Traditional Italian pet shop

A sneak preview of a Nomisma survey to be presented during Zoomark in Bologna gives a profile of the average Italian independent pet shop: operating in

the market for more than 10 years, small – not exceeding 400 sq m – and with 2-3 sales staff. This category of retail outlets still persists, despite the growth of chains like Arcaplanet, supermarket-owned pet stores – a specifically Italian distribution scenario – the grocery channel and, of course, e-commerce.

Independent stores like these distinguish themselves through the meticulous service offered to pet parents. Customers are never left alone in front of a shelf but are accompanied throughout the purchasing journey while being listened to, informed, encouraged and advised. Only branded products are available, with virtually no space for private labels.

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***Unlike in the specialist pet channel, private label pet care products are gaining share in the Italian mass market.***





## Italian pet care market value

(in billion €)

3.9 2021



4.3 2022



4.6 2023



5.2 2024



5.4 2025 (forecast)



Source: Euromonitor International

### Private labels elsewhere

Unlike in the specialist pet channel, private label pet care products are gaining share in the mass market.

According to Circana data presented at Marca 2025 – the Italian trade fair dedicated to private labels – retailers' branded products reached a turnover of €26 billion (\$28B) in Italy in 2024. This includes DMO (organized modern distribution, such as supermarkets, hypermarkets and organized retail chains) and discount, and is up 2.4% compared to 2023.

Italy has reduced the gap with the European average for the percentage of private label products in the total market, which increased by 0.5% in the past year and now stands at 35.8%. In 2024, private labels in Italy became sales leaders in numerous categories.

Over 90% of fresh produce such as meat, fruit and vegetables is private label. In the pet care category, this has now reached a 41.3% share of the market.

TEHA (The European House – Ambrosetti) presented this data at Marca as part of its analysis, 'The leading role of modern distribution and private labels in the sustainable transition of the agri-food supply chain'.

### Demand for sustainable packaging

In recent years, Italian pet parents have become increasingly concerned about the environmental impact of their pet-related purchases – whether that's food, accessories or other items.

This shift is reflected in the rising demand for eco-friendly products, such as biodegradable pet waste bags, organic pet food and sustainably produced toys.

The growing awareness of sustainability among the population is part of the broader global trend and does not only apply to Italy's pet market. According to the Nomisma Observatory, one of the main drivers for more than 1 in 5 Italians when choosing food products in general is the use of packaging from renewable sources (23%), completely recyclable packaging (23%) or no over-packaging (21%).

Nomisma also highlights how the search for environmentally low-impact packaging becomes even more pronounced for healthy and sustainable products:

## Italian pet population (2025, in million)



Source: Euromonitor International

73% of Italian consumers consider it important or essential to have packaging with a high sustainability profile when purchasing healthy products. That rises to 76% when it comes to sustainable food.

In this context, the pet food and pet care markets are clearly aligning with the broader consumer demand for sustainability. As Italian pet owners become more conscious of their environmental footprint, they are increasingly seeking out products that reflect their values. Sustainability is not just a passing trend, but an essential consideration for both manufacturers and consumers moving forward. ♦



#### Italy's new professional code for pet groomers

On 1 April, Italy implemented a new Attività Economiche (Classification of Economic Activity) or ATECO code – 96.99.12 – dedicated to the pet grooming sector and enhancing professional recognition and streamlining administrative processes.

ATECO is a system that categorizes various economic activities for statistical, fiscal and administrative purposes. The move aims to differentiate grooming services from other pet-related activities, such as pet shops and boarding establishments.

The introduction of the code is expected to provide several key benefits, such as offering pet groomers greater professional recognition by clearly defining their role within the broader pet care industry. It will also simplify bureaucratic processes by enabling more accurate tax and contribution classifications.

The code will allow for a more detailed assessment of the sector's risk levels, which may influence occupational health protections in the future. Additionally, this move allows groomers to access targeted incentives, financing opportunities and data-driven policies designed to support their professional development.



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Nicolò Galante, CEO, Arcaplanet

## “With 590 stores, expansion requires careful decision making”

Italy’s largest pet care omnichannel specialist, recently acquired by Fressnapf, is still growing but is making sure that data science and insights are behind every expansion decision.



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

Since PETS International last spoke to Nicolò Galante, CEO of Arcaplanet, in 2023, a lot has changed. Arcaplanet now has a network of over 590 pet stores in 20 regions, an e-commerce channel and over 3,000 employees. Although the company is still opening 40-50 stores every year, its online sales have been rocketing. In 2022, this accounted for €40 million (\$44M), but Galante tells us he expects this to exceed €70 million (\$76M) in 2025.

### *How has your omnichannel strategy evolved in the past 2 years?*

Today, we are among the leaders in the online market. Amazon has gained market share over the past 24 months, but we are particularly proud that we are now gaining share in a very profitable way.

For a retailer, there’s always a dilemma: do I push for growth online and sacrifice profits, or do I focus on profits and slow down growth? We have managed to achieve both – double-digit growth and double-digit profitability. I don’t think anyone else in the pet sector can consistently claim that.

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When I joined, our online channel was losing money because it was seen as a standalone business. Now, it is fully integrated with our stores. Almost 1 out of every 2 online orders is prepared in-store, and more than half of our deliveries are fulfilled via our stores.

***And now you are going a step further?***

We will soon be the first pet retailer in Italy to launch a 1-hour delivery service. When customers place an order online, they'll see if the product is available in their nearest store and can pick it up within an hour. If they prefer home delivery, we're partnering with food delivery services to bring it to them within an hour. Even Amazon can't match this, so it's a real competitive advantage.

***Do you really see a demand for that? It could also reduce traffic in your stores...***

Yes, absolutely. At the core of this initiative is a definite customer need – saving time and money. Of course, not all customers prioritize that, but there is a clear segment that does. For us, the fundamental question is always: is there a customer need, or are we just cannibalizing ourselves and giving away value? In this case, the answer is clear – yes, there is a strong demand.

Of course, some customers will shift from in-store to online purchases, but that's not a concern. If there's a real customer need, they will eventually buy online anyway – so it's better that we serve them through our loyalty program and keep them within the Arcaplanet omnichannel platform. Our highest-spending customers are also our most loyal, so making their experience more convenient is a win-win.

***You are a retailer but also a producer. How's that going?***

We started manufacturing our first kibble in the summer of 2023, and by the autumn-winter of that year, we were selling it in our own stores. Over the past 18 months, nearly all our dry private label range has been produced in our factory. Our first phase – insourcing what was previously outsourced – is complete.

We are about to enter the second phase, focusing on innovation. The goal is not just to produce, but to lead in product differentiation too. We are now also manufacturing for third parties, including other retailers and premium brands. Of course, we don't produce for direct competitors, but we are working

***"The fundamental question is always: is there a customer need, or are we just cannibalizing ourselves and giving away value?"***

with other companies across Europe and beyond. This collaboration brings fresh ideas and helps accelerate our innovation cycle.

***Could we soon see a private label brand from one of your competitors in another country being produced by Arcaplanet?***

Yes, absolutely. We produce exclusive private label ranges for our clients. In some cases, where we don't see a conflict, we may also offer our existing private label products for resale. Today, we produce about 100 different recipes. The range continues to expand, as innovation in this sector is constant.

Our factory has a potential capacity of around 100,000 tonnes per year. Right now, we are operating at about 40% of that capacity. Arcaplanet alone won't be able to fully utilize it, so if we want to maximize our factory's potential, we have plenty of room to work with major players across Europe and beyond.



***You have become a producer just as pet ownership patterns are changing...***

New dog adoptions are decreasing at a pace you could expect after COVID, but maybe faster than we expected, while the cat segment is still growing very, very steadily. This combination is currently favorable to the grocery sector, because the specialist sector in Italy – I would say in most countries in the world – has a higher share of dog products, whereas the grocery sector has a higher share of cat products.

This changing mix is happening, so big brands that focus on specialist value propositions, and specialist retailers like us, have to join forces and act quite decisively and purposefully in order to premiumize the cat category through innovation. Otherwise, this demographic shift in the pet market will be unfavorable for us. Vertical integration gives us an additional tool. We are not just waiting and hoping that big brands do something – we can act ourselves if they don't.

***Last time we spoke, in 2023, Arcaplanet had 2 million loyal active customers and that number was growing quickly...***

We have now passed 2.5 million active members and are on the road to 3 million. The most important thing is that we've reached what I believe is quite a record, not just in the pet industry but across industries. More than 90% of our sales, including online – where the percentage is usually lower – are from customers enrolled in our loyalty program. This gives us a rich base of customer insights.

***Is Southern Italy a region where you are focusing your expansion efforts?***

Southern Italy is still the region where we want to grow the most in terms of expansion. We've also discovered that customers in the south have specific preferences and behavior. Initially, we used a one-size-fits-all approach, applying a similar store format in Milan and Sicily, but we are now developing a more tailored model.

***"More than 90% of our sales, including online – where the percentage is usually lower – are from customers enrolled in our loyalty program."***



We already have over 50 stores in the south, and we aim to expand to at least 200. However, in order to make that move, we are refining our store format to better suit the region. Southern Italy has a lower per capita income and a shorter history of pet parenthood, so we're adapting our approach to ensure long-term success. It's an exciting challenge and there's still work to be done.

***You have nearly 600 stores. What's next?***

The more, the merrier! However, given the number of stores I mentioned, we need to be increasingly sophisticated in our processes and algorithms, leveraging our loyalty customer data platform. With 590 stores, expansion requires careful decision making, because opening a new store can impact existing ones.

Apart from the south, there are very few areas where we are planting our flag for the first time. In most medium-size cities, we already have 5 or 6 stores, so we must be much more 'scientific' about expansion.

***How are your urban concept stores doing?***

We first tested a new format in Milan that was more eco-friendly, and now we have 4 locations. The most important part of the test was its environmental friendliness, which we are currently implementing across our entire network.

We are also experimenting with a more urban store model – under 200 sq m, no parking, and located in high-density areas. For example, we have a couple of stores in Milan's underground stations and a few at street level. They are performing well, but it's too early to decide on scaling. For now, we are focused on optimizing them.

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***You recently launched your veterinary clinic concept. How is it going?***

We currently have 4 clinics and our focus now is on balancing professional freedom for veterinarians with commercial synergies with Arcaplanet. It's a delicate process, but if we get it right, this will be a massive success.

Once we refine our model, we plan to grow from 4 clinics to 20, then 40, and potentially 100. The goal is to establish a clinic wherever we have 5-10 stores nearby.

***Could you tell us more about your recent rollback initiative?***

It's called 'retromarcia'. In Italian, retro means the reverse gear in a car. In the grocery sector, a similar concept exists called 'rollback'. Unlike a temporary promotion, which lasts 2-3 weeks, a rollback price stays low for at least 3 months, maybe even permanently.

Since our average customer visits once a month, they need to be able to rely on these price moves remaining stable. This initiative is crucial for us – we still do traditional promotions, but for core products and top sellers, we aim to lower prices and keep them down as long as possible.

***Italy's Revenue Agency has stated that plant-based pet litter is subject to 22% VAT. Is this impacting your business?***

It is affecting us and the whole category a lot. Especially because the plant-based category was not subject to this type of VAT before. It was our fastest growing segment, and it is obviously more sustainable. Now, with the VAT increase, it has taken a hit.

So yes, there is an impact, unfortunately, and it's precisely the wrong impact on the right category! Somehow, we are managing to absorb part of this.

***Are you seeing consumers changing their behavior because of this?***

Not all of them, and then of course, we are trying to make an effort to also ensure that people have a better understanding of what the benefits are. So that they realize that, even though the price is higher, the benefit-cost ratio is still a good one.

***"We still do traditional promotions, but for core products and top sellers, we aim to lower prices and keep them down as long as possible."***

***It is 4 months since Fressnapf announced completion of its acquisition of Arcaplanet. How has the company changed since then?***

There are clearly a lot of potential synergies. I mean, there's – to name just one – the factory where we could produce part of the present ranges. We are sharing a lot of best practices. With so much experience in so many different countries, Fressnapf has a wealth of experiences to share. I would say that Arcaplanet's performance is, by many metrics, world-class, therefore we have many good practices to share too. So I think there are going to be a lot of wins here.

***Do you see Arcaplanet being present outside of Italy since Fressnapf's acquisition?***

Prior to the acquisition, we were definitely considering internationalization for Arcaplanet. My personal opinion now is that I don't think that is a priority anymore. Where I do see an opportunity for internationalization for Arcaplanet is in bringing our exclusive brands abroad.

We have some very interesting exclusive brands that also cover segments which Fressnapf is not fully covering today with its own high-end brands. So, I can see some of ours being sold in the Fressnapf network in the near future. ♦



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# E-commerce expansion boosts Italian pet businesses



Despite a general slowdown year on year, the online sales of pet-related products still recorded significant growth in Italy in 2024. Who are the main players, and how is the competitive landscape shaping up?



**Davide Casaleggio**  
CEO  
*Casaleggio Associati*

According to the E-commerce in Italy 2025 report by digital strategists Casaleggio Associati, online sales in the Italian pet sector – which includes food, products and accessories – grew by 7% last year. This is a positive figure, albeit lower than the 37% growth recorded in 2023 (which was accelerated by a significant average price increase of 12.5%). As a result, the sector reached a value of €259 million (\$283M) in 2024 with virtually no increase in prices (+0.3%).

## Big names in e-commerce

Italian e-commerce activities for the pet sector are characterized by a strong national presence. 95% of operators are of Italian origin and many of them are based in the regions of Lombardy, Campania and Emilia-Romagna. Despite this, the competitive landscape also includes foreign players – mainly from

Spain, the US and France. Although representing a numerical minority, they occupy half of the top 10 positions in terms of market importance.

## Top websites for pet owners

According to Casaleggio Associati's ranking as of February 2025, Zooplus is the market-leading website for Italian pet parents. It has by far the highest number of unique monthly visitors (at 1.1 million). This website also scores the highest average visit time (how long people stay on the website), at 8 minutes and 14 seconds. However, the bounce rate (how many people immediately leave the website after being directed to it by a search engine) is relatively high, at 56%.

Ranked by the number of unique monthly visitors, the rest of the top 5 is made up of Arcaplanet (807,000 unique monthly visitors), Bauzaar (178,000), Zoomalia (155,000) and Isola dei Tesori (138,000). At just 45%, third-placed Bauzaar has the lowest bounce rate and is the only one to register below 50%. [▶ SEE NEXT PAGE](#)



### Resilient and adaptable sector

The pet sector continues to represent an important part of the Italian business-to-consumer (B2C) e-commerce market, with the estimated turnover putting it among the strongest in the broader consumer products sector. The growth, although more moderate than in previous years, testifies to the resilience of the pet sector and its ability to adapt to new economic and market challenges.

One of the aspects that emerges clearly from the Casaleggio Associati report is the preference of users for quick and easy purchases. This is a particularly crucial factor in the pet sector, where regularity and buying habits play a central role.

### Opportunities for apps

Despite this, many of the main pet sector websites analyzed do not offer dedicated apps for mobile purchasing. This is particularly surprisingly in view of the increasing importance of apps in the Italian e-commerce landscape in general, and their decisive impact on customer loyalty and purchase frequency.

For the pet sector, the introduction of an app could represent a crucial opportunity. In fact, as the Casaleggio Associati report points out, operators who have already developed app-commerce solutions record an average increase in turnover of at least 10%, particularly through integration with advanced customer relationship management (CRM) systems for one-to-one loyalty programs.

### Room for logistics improvements

From an organizational and logistical point of view, the Italian e-commerce sector is still relatively traditional. 65% of companies maintain in-house logistics, with little reliance on third-party partners or marketplaces for warehouse and shipping management. In fact, only 16% of the surveyed companies fully delegate logistics to external partners, and only 7% to marketplaces.

Although this model provides greater control over quality and service, it potentially limits expansion and operational flexibility. The majority of Italian



e-commerce companies recognize there is significant room for improvement in shipping management, with as many as 88% expressing dissatisfaction with their logistics providers.

### Strategic priorities in 2025

In terms of digital strategy for the coming year, the top priorities in the Italian e-commerce sector are to increase turnover (64%), build customer loyalty (44%) and increase brand awareness (45%). This reflects a growing awareness of the importance of margins and gaining market share over competitors.

Another key trend for the near future will be the implementation of technologies based on artificial intelligence (AI). In the pet e-commerce sector, AI could have a decisive impact in several areas: from the personalization of the customer experience (already adopted by 24% of Italian e-commerce companies), to advanced tools supporting the management of data and sales forecasts.

### Innovation and AI drive advantage

In conclusion, Italy's pet e-commerce sector shows a strong propensity for innovation and a constant focus on the quality of the service offered. Despite the slight contraction in 2024 compared to the previous year, the sector is maintaining positive and significant growth.

The positive outlook is supported by as-yet-unexplored potential, especially in the areas of technology and logistics. Companies that manage to exploit these opportunities, especially through the introduction of apps and the strategic use of AI-based solutions, will undoubtedly gain an important competitive advantage in the coming years. ♦

***65% of companies maintain in-house logistics, with little reliance on third-party partners or marketplaces for warehouse and shipping management.***



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The EFSA approval of its proprietary *L. reuteri* probiotics underscores their safety and efficacy, while the introduction of *L. reuteri* NBF DC PRO postbiotic offers a groundbreaking approach to gut health.

As demand for clinically supported gut health solutions grows, NBF LANES BIOME remains a trusted partner for companies seeking advanced solutions.

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# Just how fragile is consumer confidence?

Economic conditions may have been looking brighter recently but, in the light of global developments, pet parents may still be looking to cut costs in 2025.



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

Confidence among consumers was reasonably steady in 2024, but this year began on something of a sour note as many industries prepared to face political uncertainty and fresh economic challenges. There are a variety of ways the pet sector might look to change in order to meet the current needs of pet owners.

## Large decline in the US

The Consumer Confidence Index® (CCI) in the US declined in December, January and February after multiple months of stabilization, and continued to drop in March. The Conference Board, a respected think tank that conducts a survey to measure CCI among the US population, found 13.7% expected their incomes to decrease in the next 6 months, up from 12.3% who said the same in January. Overall, consumer confidence saw its largest monthly decline since August 2021.

"References to inflation and prices in general continue to rank high in write-in responses, but the focus shifted towards other topics," says Stephanie Guichard, Conference Board Senior Economist, Global Indicators.

"There was a sharp increase in the mentions of trade and tariffs, back to a level unseen since 2019. Most notably, comments on the current [US] administration and its policies dominated the responses."

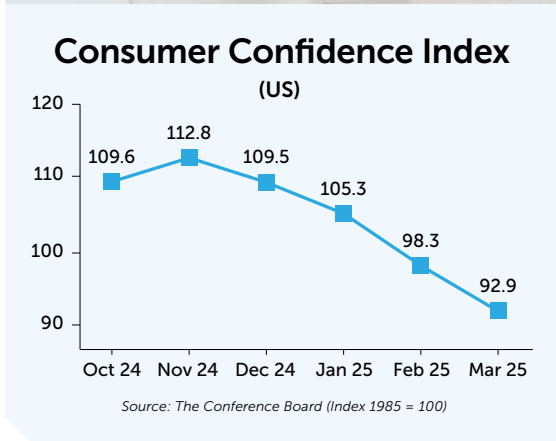
## Mixed picture elsewhere

Numbers abroad have not mirrored the US figures. Australian consumers became increasingly pessimistic around the end of last year, but consumer confidence rose 4% in March, according to research by the University of Melbourne. Confidence in the EU has also remained sturdy.

There, the Economic Sentiment Indicator (ESI) dipped in December but ticked back up slightly in January and February. However, retailers' business expectations for the next 3 months worsened moderately.

In South Korea, political upheaval rattled consumer confidence in December, with the Bank of Korea's monthly survey reporting the lowest confidence there in years. But optimism picked up again in January and rose 4.4% in February. In Japan, the CCI dropped sharply in December and January, but the decline may have begun stabilizing in February, when a 0.57% decline in consumer confidence was reported.

[▶ SEE NEXT PAGE](#)



Following a relatively successful 'soft landing' from the high inflation wave that marked the first half of this decade, the economy has remained relatively strong in the US and elsewhere. Costs remain high, however, leading many people to continue to feel the need to tighten their belts.

### Areas of concern

Pet industry consumer confidence may be somewhat stronger than the market overall, according to Lorraine Shirley, an expert on the US pet industry and Manager at Clarkston Consulting. However, there are unique reasons for concern because of which population groups have been driving the strongest declines in consumer confidence overall.

December's decline in confidence was driven by consumers over the age of 35, which includes most millennials, a generation that drives a large amount of spending in the pet market.

That month, confidence also declined most sharply among those living with household incomes of between \$25,000 (€24,350) and \$100,000 (€97,400), a large group that could be susceptible to belt-tightening.

### Impacting non-essential items

The proportion of those surveyed who are planning to buy homes is also down, which could mean more people living in rented properties that are less likely to be pet friendly. Anything bringing down the pet population naturally affects the sales of pet goods.

Shirley believes these trends may impact durable products more than consumables. "I don't expect that (...) we're going to see a decline overall in food. I would see pet owners focusing their dollars on, again, pet food, maintaining their purchases in that space but potentially drawing back on some of that non-discretionary spend."

### Political and economic disruption

Many US consumers responding to the Consumer Confidence Survey said that politics, including tariffs, were shaking their confidence. In Europe, the ESI did increase in February, but future consumer confidence numbers there and elsewhere will obviously depend on political and economic developments in the months ahead.

Worrying about the future can drive many consumers to spend less on non-essential pet goods too. However political winds may blow in the long term, there's clear evidence that shoppers are still looking to cut costs even years after inflation peaked.

### Premium still going strong

As of January, Shirley notes there is little evidence that premium food products are about to lose significant ground. "The premiumization and pet owners' interest in maintaining the best quality of food for their pets, I think will still remain strong," she says. "It hasn't wavered, despite fluctuating consumer confidence in the last year."

***Many US consumers responding to the Consumer Confidence Survey said that politics, including tariffs, were shaking their confidence.***

A similar trend is ongoing in Europe. “Shoppers are looking to ensure value for money in their pet purchasing. This doesn’t mean always buying the cheapest products, but they want to feel that, where the price is more expensive, the extra pounds or euros are worth it. So those brands and products that have functional or added health benefits are thriving,” says Mike Davies, Global Analytics Leader at NielsenIQ.

**Less could be more**

However, the push for premium food could take different forms – so manufacturers and retailers may need to get creative. “Pet owners are still wanting to give the best quality to their pets, but it might be in smaller quantities,” Shirley says. “They’re not maybe willing to spend the 100-whatever dollars on their food up front.”

For example, premium-quality kibble might face new weaknesses if hit with competition from food toppers or nutritional treats and supplements. Treats and toppers allow pet parents to feed their pets functional ingredients without breaking the bank. That means an opportunity for growth in the premium treat market and more limited growth in premium food.

**Discount with caution**

Inflation has cooled down significantly since its peak in 2022 – in the pet industry, too. Many countries, including the US, Canada and Spain, have experienced deflation in the pet sector, and many other countries that have published pet-specific data show slowing inflation.

While some pet supplies are getting cheaper, costs in the pet sector are unlikely to have a clear impact on consumer confidence. If shoppers are paying more of their income towards housing and groceries, cooling pet inflation will not likely be enough to offset this broader economic pain for pet owners.

According to data from NielsenIQ, more products are being sold on promotion than ever before. Davies suggests that consumers “will also happily buy bigger packs if that generates a longer-term saving”. This presents both opportunity and risk for businesses.

While discounts can help increase sales volume, Davies warns against relying too heavily on deals. “Both manufacturers and retailers still need to be really cautious. It’s tempting to invest heavily in promotions to try and drive volume, but longer term this can be damaging and undermine brand equity and ‘train’ shoppers to buy what’s on offer.”

**The need to differentiate**

Taken together, these trends and greater uncertainty could threaten the industry’s top players. “Because of the concerns of overall cost and price, there are more pet owners that are willing to change or try new brands,” Shirley says. “What that means for pet incumbents would be [that they need] to really try to think about how are they differentiating.”

Lack of confidence and cutting costs mean more people could be looking at new brands. That’s an opportunity for small companies and a challenge for large ones. NielsenIQ has also seen an increased propensity of consumers to switch brands or channels to find savings and quality.

**A brand loyal audience**

Luckily for some of the largest brands in the industry, brand loyalty is strong among pet owners. Spring 2024 research by Cleveland Research Company found that 51% of pet owners surveyed say they would not switch brands of pet food to save money. In December 2024, The American Customer Satisfaction Index found particularly strong satisfaction with industry players such as Pet Supplies Plus and online retailer Chewy.

Many firms are pushing brand loyalty as a response to weakened consumer sentiment, such as through subscriptions. “These can be a win-win, as it makes it much easier for the pet parents, not having to think about their purchasing, but also supports manufacturers as it locks buyers into their brands and reduces the number of occasions where shoppers might switch,” Davies says. ♦

***Premium-quality kibble might face new weaknesses if hit with competition from food toppers or nutritional treats and supplements.***



# A hyper-convenient model that offers opportunities for everyday and specialty products

**Pet care through on-demand delivery has moved from 'just need it now' to become part of many pet owners' daily routines.**



**Carlos Hernandez**  
*Global Head of Grocery & Retail*  
*Just Eat Takeaway.com*

A poll of 4,000 customers across the UK, Germany and the Netherlands commissioned by Just Eat Takeaway.com (JET) in 2024 found that 77% of consumers identify pet care as a category where they expect to be shopping on-demand in the future.

## Enhanced shopping experience

The poll findings show that 1 in 4 consumers struggle to find the items they want when shopping in-store, while half say that long checkout queues frustrate their shopping experience. In addition, consumers think that on-demand delivery is 3x more stress-free than in-store shopping and 1.5x more comforting.

## More and bigger orders

JET recently expanded into non-food categories, including pet care. The company has signed several partnerships to amplify its pet care offering, including with Fressnapf/Maxi Zoo in Austria, Switzerland and Ireland, Anicura in the Netherlands, Guaw in Spain and Just for Pets in the UK. In 2024, pet product orders at JET soared by 200%, while basket sizes grew by 260%. The company has delivered more than 1 million orders containing at least 1 pet care item.

Within the platform, products for dogs dominate, appearing in 58% of consumer baskets, while cat products make up 37%.

The other 5% accounts for other pets, including fish, birds, rodents and reptiles. On average, pet owners purchase 8 items per order, highlighting the growing market for on-demand pet essentials.

## Regional differences

In Austria and Switzerland, where JET entered into its first partnership with a pet brand, consumers are now more familiar with the offering, so basket sizes are higher at an average of 8 and 9 items respectively. In the UK, pet owners typically buy 5 items per order, while markets where the offer is newer are lower – but growing. This increasing basket size signals a shift in consumer behavior.

## Ordering patterns

Sales within the pet care category are more frequent toward the end of the week and beginning of the day, as pet parents plan their weekends and day ahead. Aligned with other verticals, orders spike at the beginning of the month after payday. The largest recorded pet care order so far at €248 (\$269) reflects the change in purchasing patterns – that's more than just some last-minute dog food and cat litter.

Over the Christmas season, one of JET's biggest partners reported that festive pet products accounted for over 10% of its sales, highlighting a strong appetite for seasonal pet offerings. The bestselling SKUs during this period skewed toward festive flavored treats.

The best performing items were pigs in blankets, turkey-wrapped carrot twists and filled Santa and reindeer treats.

### Who's selling and who's buying?

While grocery retailers continue to dominate pet care sales through the JET platform, specialized retailers are closing the gap. With these retailers, sales are largely made up of dog supplies, with frozen dog food, dry dog food and dog treats the best-performing SKUs.

The company is also noticing a growing interest in raw dog food from dog-specialized partners – a premium option for owners looking to go the extra mile.

During 2024, in the UK alone, JET saw 316,000 searches for 'dog', 420,000 for 'cat' and 174,000 for

*Consumers think that on-demand delivery is 3x more stress-free than in-store shopping and 1.5x more comforting.*

'cat litter', showing the scale of interest in on-demand pet care products. The top searched brands on the platform globally were Felix, Pedigree and Whiskas.

### The convenience lifestyle

In Europe, 46% of households have at least 1 pet and the pet care industry itself is expected to reach \$350 billion (€323B) globally by 2027. JET data shows that millennials, who make up a third of pet parents, are especially focused on convenience. With busy lifestyles, they're always looking for ways to make pet care easier.

Products such as luxury pet fashion, as well as functional and healthy food options, are becoming regular items in these shoppers' baskets. An on-demand platform offers an opportunity to meet their high expectations by delivering specialty products that might not always be available at the grocery store. ♦



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## Harnessing the power of marketplaces in the pet space

**E-commerce platforms are an increasingly popular option for consumers, including when shopping for their pets. So how can pet industry vendors leverage these online marketplaces in their distribution strategies?**



**Tom Gladstone**  
Partner  
OC&C Strategy Consultants

Consumer-facing online marketplaces that enable third-party sellers to offer their goods and services to a broad audience have already reached an impressive scale of trading and continue to grow rapidly.

### A global phenomenon

The top 100 online marketplaces globally now account for over \$3.8 trillion (€3.5T) of total gross merchandise value (GMV). According to e-commerce research agency Digital Commerce 360, this has more than doubled in size in the past 6 years.

This is a channel that was already growing strongly pre-COVID, but accelerated during the pandemic. Even in the post-pandemic and consumer income

squeeze years that have followed, it has continued to deliver growth with marketplaces having an established presence in all major global areas.

According to business intelligence firm Marketplace Pulse, Amazon's third-party marketplace business across all categories worldwide accounts for an estimated \$480 billion (€440B) of its \$700 billion (€642B) GMV. Since 2018, this has grown at 25% each year, nearly twice the rate of its own e-commerce retail sales.

### Gaining pet market share

In the pet segment, Amazon has not only taken market share from offline retailers but has also gained share from online pet category specialists.

Over the past 2 years, for example, this platform has won business at the expense of Chewy in the US and Zooplus in continental Europe.

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Underpinning this success are 2 key areas where Amazon has proved effective at capturing consumer demand: winning consumer replenishment transactions in pet food and consumables, and gaining share in pet accessories and equipment sales.

For example, based on our research, online marketplaces already account for a 20-30% share of pet food share in many developed Western markets, and a significant proportion of this is sold through Amazon.

### Keys to Amazon's success

One reason for this is that Amazon has an unparalleled consumer reputation for the breadth of its range. In a survey asking consumers in the UK, US and Europe to rate 100 retailers, including major pet players Pets at Home, Jollies, PetSmart, Petco, Chewy, Fressnapf, Das Futterhaus and Zooplus, Amazon was ranked top in all 3 markets for offering the widest choice.

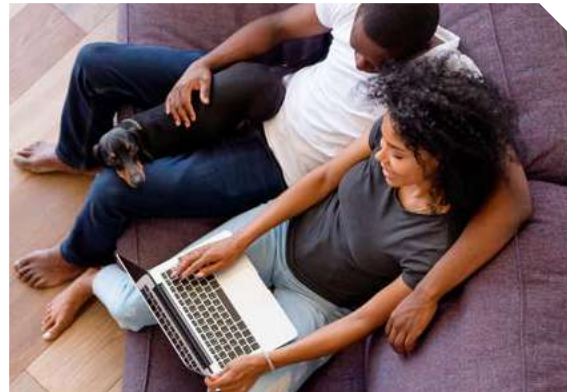
This is complemented by Amazon's strong price proposition. For example, when the consumers were asked to rate the retailers' value for money on a scale of 1-5 (with 5 being best and 1 being worst), bricks-and-mortar pet specialists were typically rated 3.8-3.9, general grocery retailers around 4 and Amazon 4.2.

Its marketplace element is a critical component of this, extending its range and offering price choice from a broad set of suppliers competing for the consumer spend.

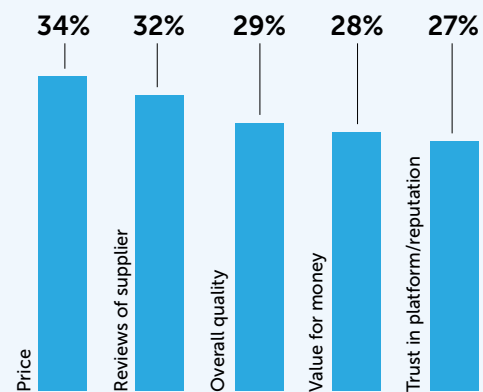
***Choosing to sell through the marketplace rather than the Amazon-owned retail model gives vendors full control over pricing and promotions.***

### Maximizing opportunities

For suppliers, trading on Amazon's marketplace offers huge opportunities, and not only in terms of reaching new areas of potential consumer demand. Choosing to sell through the marketplace rather than the Amazon-owned retail model gives vendors full control over pricing and promotions, enabling them to avoid channel conflicts elsewhere.



### Top 5 purchasing criteria for shoppers using pet marketplaces



Source: OC&C Consumer Research

For example, in pet food, Amazon tends to over-index in larger pack sizes in line with its stock-up replenishment consumer purchasing mission. Additionally, suppliers need to take care to manage price and promotional consistency across all channels when they are also selling through specialty channels. The ability to control pack size/format exclusives per channel can help with that.

Suppliers who come from a heritage of distributing through B2B channels in particular need to build a toolkit of capabilities to win on Amazon. Successful trading requires thinking carefully about the marketing investment to gain the right listing positions, as well as making the most of product descriptions, managing reviews and carefully optimizing pricing.



As other suppliers also push to leverage Amazon's marketplace, this increased competition is raising the cost of advertising and securing the best listing space on the platform. Meanwhile, Amazon continues to increase the slice of value (the 'take rate') that it captures.

As a consequence, the most successful vendors are investing in developing dedicated teams with Amazon-specific capabilities, and building out the unique datasets and insights needed to optimize trading decisions.

***Pet adoption marketplaces give access to new owners at a particularly valuable point in their customer journey: a time of investment in equipment and accessories.***

### Price disruptors

With the success of Chinese-founded players such as AliExpress, Shein and Temu, a different breed of marketplaces is emerging.

Connecting consumers directly to suppliers of very cheap Far Eastern products, they are achieving substantial growth. They are particularly gaining traction among younger consumers, who seem willing to forgo quality and speed of delivery for low prices.

Even sustainability concerns do not appear to be a barrier. OC&C's consumer research indicated that sustainability is a factor in only 30% of purchasing decisions; 70% of consumers decide based on other priorities.

So far, these marketplaces are mainly gaining a foothold in categories such as fashion and accessories, and do not yet play a big part in the pet category.

Perhaps they never will in areas such as pet food but, as today's teenagers and 20-something fashion buyers mature into tomorrow's new pet owners, categories such as pet equipment and accessories have the potential to become much bigger on these platforms.

Suppliers of such pet products may need to consider whether these marketplaces pose a long-term threat or opportunity.

They can then decide whether they should become a player on such platforms, or whether they should make defensive moves – such as reinforcing their offering at lower price points or communicating the quality benefits more clearly.

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## Consumer preferences: pet specialty store vs Amazon

(rated on a scale of 1-5)\*



\*Average of a basket of leading European and US pet specialty stores.  
Source: OC&C Consumer Research

### Marketplaces for pet services

Beyond the tangible world of products, we are also seeing the emergence and growth of marketplaces for pet services, particularly in areas beyond health and veterinary services. For example, categories such as pet boarding, pet sitting, dog walking and pet adoption have a highly fragmented set of small-scale providers. These naturally lend themselves to a marketplace model that matches service providers with customers.

In pet adoption, for instance, we have seen a shift from classified listings (offline and online) to marketplace models that take payments or deposits. Similarly, standard marketplace models are on the up in pet sitting and boarding, with more innovative models emerging too.

For example, TrustedHousesitters matches pet owners who are looking for someone to come to their home and look after their pet while they are away with pet sitters who also use the pet-sitting opportunity as a chance to spend time in a different location.

### The importance of trust

With over 85% of dog and cat owners regarding their pet as a cherished member of their family, building consumer trust is paramount for suppliers on marketplaces for pet services. OC&C's consumer research shows that 3 of the top 5 drivers of consumer purchasing behavior among pet parents are linked to trust and quality.

So how can marketplaces help to build that trust? Service provider vetting and rapid problem resolution are 2 key areas that need to be got right. Additionally, user reviews of suppliers are equally critical in trust building.

### Potential for pet product suppliers

Marketplaces for pet services may be of potential interest for product suppliers from a partnering or marketing perspective.

For example, pet adoption marketplaces give access to new owners at a particularly valuable point in their customer journey: a time of investment in equipment and accessories, and when brand preferences are being formed.

Other marketplaces for services such as dog walking might give suppliers access to more affluent or higher-spending pet parents. Therefore, in an era when onboarding new customers is becoming increasingly costly, it is worth considering how these types of marketplaces could play a role in advertising or lead generation for products.

In summary, marketplaces are a huge and rapidly growing opportunity that will become an increasingly important route to market for suppliers in the pet industry. To be a winner in this channel, you must not only offer a great product or service but should also build the specific capabilities to trade on these platforms effectively. ♦



**DANA Technology DENMARK**

## Innovative machinery solutions for wet pet food manufacturers

**DANA designs advanced machinery for wet pet food, offering solutions that improve production efficiency, quality and sustainability.**

### Functional proteins

DANA Technology ApS (DANA) is a Danish company with a strong reputation for delivering innovative solutions. DANA helps businesses advance their production lines with tailored machinery that meets industry needs.

### Flexible end-to-end services

Operating from Denmark and serving clients globally, DANA provides end-to-end services, ranging from initial concept and engineering design to individual machines and full turnkey solutions, including commissioning. This flexible approach allows DANA to accommodate the specific requirements of each client, ensuring optimal solutions for various production demands.

### Industry expertise

With a wealth of experience and a strong focus on innovation, DANA is equipped to tackle unique challenges in the wet pet food industry. Whether businesses are scaling up, modernizing or building new facilities, DANA adapts its solutions to meet diverse production needs, regardless of size or complexity.

### Flagship technologies

#### **DANA Rotary Disc Texturizer (RDT)**

This advanced machine is a game-changing innovation for wet pet food manufacturers. It transforms emulsified meat into structured, meat-like premium chunks, allowing manufacturers to increase production efficiency, reduce costs and create premium products that pets love.

The RDT uses a precise combination of mechanical rotation and thermal energy to coagulate proteins, achieving the ideal texture. This technology also enables the conversion of low-value byproducts into premium pet food, increasing sustainability and profitability without sacrificing product quality.

#### **DANA steam tunnel**

The DANA steam tunnel sets new industry standards for precise and consistent cooking.

Designed for optimal heat transfer, the steam tunnel ensures uniform results while maintaining the highest efficiency and quality standards in production.

### Building trust

Vagn Hansen, CEO of DANA, highlights the company's commitment. "At DANA, we don't just build machines – we build trust," he says. "Our success is measured by the long-term relationships we create with our customers, ensuring they always have a reliable and innovative partner in production technology."

DANA works closely with trusted Original Equipment Manufacturers (OEMs) to provide clients with the most suitable tools and technologies to achieve their production goals. The company's primary focus remains on helping businesses create premium products while streamlining their operations, reducing complexity and boosting efficiency.

By choosing DANA, wet pet food businesses gain a reliable, innovative partner committed to helping them build the future of production. ♦

**Zoomark: Hall 26, Booth C88**

**DANA Technology ApS**  
dana-technology.dk





# Meeting the challenges posed by refrigerated pet food

As fresh pet food continues to gain traction in the market, warehousing and supply chains must evolve to meet the increasing demand while making sure they uphold food safety and quality standards.



**Jim Chamberlain**  
*Senior Managing Director*  
*Alpine Supply Chain Solutions*

While shopping for pet food recently, I noticed something that stopped me in my tracks: an entire aisle of refrigerated pet food – something more traditionally found in the dairy section of a grocery store than a pet store. Fresh-cooked meals, raw blends and gourmet recipes filled the shelves, all promising to improve my pet's health.

## Maintaining cold chain integrity

Demand for fresh pet food is clearly booming, but what does this mean for the supply chain? Unlike kibble and canned food, refrigerated pet food requires cold storage, temperature-controlled transport and careful handling. This shift is reshaping logistics, from expanding cold storage to rethinking last-mile delivery.

The perishable nature of refrigerated pet food introduces unique challenges that warehouses and logistics providers must address to ensure cold chain integrity. These include:

### Optimizing inbound and outbound processing times

Unlike dry pet food, refrigerated products can't sit on a receiving dock for any length of time without compromising their quality. The moment a shipment arrives, it's a race against time to offload, reconcile and move products into the appropriate temperature-controlled storage as quickly as possible. On the outbound side, orders must be accurately picked, staged in temperature-controlled areas and loaded onto refrigerated trucks without unnecessary dwell time.

### Temperature sensitivity

Refrigerated pet food must be stored and transported within strict temperature ranges, often between 32 °F

and 40 °F for fresh products. Even brief exposure to improper conditions can accelerate spoilage, degrade nutritional value or create food safety risks. This requires precise temperature monitoring at every stage.

#### **Food safety and cross-contamination risks**

Fresh and raw pet food can introduce risks of bacterial contamination if not handled properly. Strict sanitation protocols, including designated storage zones, separate processing equipment and frequent cleaning procedures, are essential to prevent cross-contamination between products.

#### **Potential recalls and traceability**

Food safety requirements are tighter than ever. If a recall occurs due to contamination, improper storage or supplier issues, warehouses must be able to quickly trace affected batches and remove them from distribution. This requires robust tracking systems, such as batch/lot control within a warehouse management system (WMS) or transport management system (TMS), to pinpoint where specific products were stored, processed and shipped.

*Strict sanitation protocols, including designated storage zones, separate processing equipment and frequent cleaning procedures, are essential to prevent cross-contamination.*

#### **Regulatory compliance and oversight**

In the US, the Food and Drug Administration (FDA) regulates pet food under the Food Safety Modernization Act (FSMA), imposing strict requirements on storage, handling and transportation. Warehouses and logistics providers must maintain proper documentation, ensure compliance with temperature controls and conduct regular audits.

#### **Last-mile delivery**

This part of the process requires careful route planning and real-time temperature monitoring to ensure products remain within the correct range until they reach their final destination. Any deviation can lead to spoilage, loss of product and dissatisfied customers, making efficiency and precision critical at every step.

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## Leveraging technology

As refrigerated pet food continues to gain traction, supply chains must evolve to handle these challenges seamlessly. The right technology plays a key role in enabling companies to meet growing consumer demand while maintaining the highest standards of food safety and quality. Integrating WMS, TMS and wireless temperature and humidity monitoring systems can help to streamline cold chain logistics and ensure safe, efficient delivery. Here's the how and why:

### Warehouse management

A WMS coordinates scheduling, ensuring accurate arrival times, and leverages Advanced Shipping Notices (ASNs) so that teams know the contents of each truck before it arrives. This enables dock door pre-assignment, speeding up the put away of items into refrigerated storage. On the outbound side, orders are staged in temperature-appropriate zones, minimizing the time products spend outside their required conditions before being loaded onto trucks.

Additionally, a WMS supports advanced inventory control including batch/lot control, and dynamic route planning. Thanks to end-to-end tracking and visibility, a WMS makes it easier for companies to comply with regulations and handle recalls. For even greater supply chain efficiency, the WMS can be seamlessly integrated with other third-party applications, like a TMS.

### Transport management

Streamlined warehouse and transportation operations are especially critical for cold storage in transportation, which is why it is beneficial to integrate the WMS with a TMS. By synchronizing order fulfillment with transportation planning, businesses can reduce costs, optimize routing and ensure on-time, temperature-controlled deliveries.

In the case of optimized route planning, real-time data is used to identify the most efficient routes, avoiding traffic and reducing mileage. This helps reduce fuel costs and delivery times.

Thanks to the visibility provided by the TMS, operational staff are made aware of any delays on the delivery side, empowering them to proactively address issues as they

arise – such as by preparing for and minimizing any temperature/humidity fluctuations, touches or time outside of the ideal zone. A TMS can also help with load optimization and regulatory documentation.

To fully support the transportation of fresh pet food, a TMS can be integrated with wireless temperature and humidity monitoring systems.

### Temperature and humidity monitoring

Wireless temperature and humidity monitoring systems are designed to ensure food is stored, transported and delivered under optimal conditions. They run on wireless Internet of Things (IoT) sensors that continuously monitor temperature and humidity levels.

A cloud analytics console provides real-time monitoring and analytics on any device. To prevent spoilage, the system sends instant alerts via email, SMS or phone whenever measurements exceed configured thresholds.

Most temperature and humidity monitoring systems are easily expandable to cover multiple locations. Thanks to downloadable reports and history logs, they help to ensure regulatory compliance.





*The right technology plays a key role in enabling companies to meet consumer demand while maintaining the highest standards of food safety and quality.*

### Transforming a cold chain

Maintaining the safety and quality of fresh pet food throughout storage and transportation requires a seamless blend of infrastructure, technology and strategic partnerships, as this example of a national pet food distributor shows.

When it decided to introduce refrigerated pet food stock-keeping units (SKUs), it quickly realized that keeping the product at the right temperature required a complete shift in how it managed its supply chain.

The first challenge was internal. It needed to install a cooler within its distribution center, but figuring out the best location wasn't straightforward. Space constraints, workflow efficiency and cost considerations all had to be factored in. Placing the cooler in the wrong spot could create inefficiencies in both inbound receiving and outbound order processing, slowing down operations and increasing labor costs.

After carefully analyzing product flows and warehouse constraints, Alpine Supply Chain Solutions helped the company to determine the optimal placement. This minimized travel time for employees while ensuring that inventory could move seamlessly from receiving to storage to outbound staging.

### Upgrading the carrier network

But infrastructure changes were only part of the equation. The distributor soon realized that the existing transportation network wasn't equipped to handle the new temperature-sensitive products. Refrigerated trailers (reefers) were needed, but the company's current mix of smaller carriers didn't have the capacity to support this shift in every operational region.

Therefore, in some cases, the distributor had to shift from smaller, local carriers to larger regional or national providers with the right reefer capacity and route coverage.

This underscores an important lesson: adding refrigerated pet food to your distribution network requires upgrading internal systems and processes, and evaluating partnerships across the entire supply chain to ensure every link is equipped to handle temperature-sensitive products efficiently and reliably. It's a challenge, but one that can be tackled with the right expertise. ♦

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## IPV PACK ITALY

### Driving innovation and global expansion: IPV PACK's future vision

Since 2004, IPV PACK has grown into a key player in high-quality packaging for pet food, food and industry. In 2024, the company celebrated a major milestone with its new headquarters in Italy, strengthening operations.

The company's expansion also reached Serbia in 2023, with a new facility enhancing its capabilities and customer service.

With 29,000 sq m of operational area and 125 skilled professionals, the company continues to lead in innovation, investing in cutting-edge technology and setting new standards in the pet food market.

IPV PACK's mission remains unchanged: to push boundaries and deliver outstanding packaging solutions.

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Versele-Laga stands out as a global producer of high-quality pet nutrition and care, offering tailored solutions for birds, small animals, dogs, cats, pigeons, farmyard animals, wild birds and horses.

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Their unique presence across all pet categories allows them to deliver powerful innovations that meet each animal's specific needs.

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**WAHL** GERMANY

## Moser Animal & WAHL: together as WAHL

The transition from Moser to WAHL has officially taken place, marking a new era for the specialist in animal hair clippers.

Customers can already find the new WAHL products in many retail stores.

In addition to the retail line for home grooming, WAHL has launched 3 new clippers for dedicated professional use. These new products are updated versions of the industry's favorites, the KM series.

At Zoomark, the company can be found in Hall 25, Booth A30, showcasing both the transitioned range and new products.

Attendees can test the clippers and see the benefits for stores and grooming salons. With a fresh approach, the company is confidently looking to the future and is ready to support its retail partners with the usual high-quality products, advice and service.

**Zoomark: Hall 25, Booth A30**

**WAHL GmbH**

[info@wahlgmbh.com](mailto:info@wahlgmbh.com)

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**BAMA** ITALY

## Qublo game/bed by Bamapet

Qublo is a modular game, bed and elegant decorative element designed for cats. It's perfect for hiding, exploring, climbing and playing with other feline friends.

It is modular and if you purchase multiple cubes, it offers endless possibilities to create up-and-down paths.

Measuring 35 x 35 x 35 cm with a rattan finish, Qublo is available in ice and taupe colors. It can be used both indoors and outdoors and is made of thermoplastic, non-toxic resin that is 100% recyclable.

Now, Qublo offers even more versatility, as it can be mounted on the wall to create hanging paths from the floor.

Compared to other cubes on the market made of cardboard or wood, Qublo is highly durable, doesn't chip and, above all, it's washable!

**Zoomark: Hall 29 MALL, Booth C16-C18**

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# VIALS



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## Country report: France

# Local sourcing and personalization are the top trends

**Despite rising costs, French pet parents are prepared to spend on high-quality nutrition, products and experiences that enhance the lives of their companions.**



**Oihana Almandoz**

*Contributor*

*PETS International*

From a growing demand for healthier and locally made food to booming business at pet shops and online retailers focused on customer experience, a lot has changed in the past few years. And despite financial concerns, French owners still want to pamper their pets.

### Made in France

Sales revenue in the French pet food market reached €4.7 billion (\$5.1B) in 2023, according to FACCO, the federation of pet food manufacturers in France.

Food is the biggest item of expenditure for pet owners with a yearly spend of €490 (\$532) for dogs and €316 (\$343) for cats.

A few multinational brands account for a large part of the pet food market, but there are also many small and mid-sized French companies that meet the needs of a growing demand for non-processed, healthy and high-quality food made in France.

Morgan Pigné, founder of pet food brand L'assiette de Max, says that more and more pet owners are asking for "a better product composition". He adds: "They check the product labels better."

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Marie Bonhomme, co-founder of Ziggy, a Bordeaux-based pet food company that sells natural products, confirms that customers ask for “fewer ingredients in products, no flavor enhancers, no food coloring and no wheat”.

“One of the main trends that we see is the thriving demand for treats. It is a dynamic market. We have launched dog and cat treat ranges which we will develop in 2025,” says Paul Bro de Comères, Chief Revenue Officer at Ultra Premium Direct, a DTC company.

### Inflation hitting hard

According to a 2024 survey commissioned by the Adocom-RP agency, price inflation has hit French consumers, with 43% of them postponing getting a dog because of high pet food prices. 7 out of 10 dog owners have experienced an increase in their pet food budget and have cut their spending – primarily on accessories, followed by food and vet services.

“Due to inflation, we have a higher demand for our own distributor brand products, which are less expensive, good quality and set at a mid-high range,” says Stephane Lagneau, Manager of the franchise network for Terranimo, a French pet shop chain. However, Ziggy’s Bonhomme explains that its customers, who are mostly middle class, “are ready to tighten their belt to spend more for their pet”.

### Competition between channels

Hypermarkets are still the preferred place to buy pet food, but purchases in pet stores and online have tripled in less than 10 years, according to FACCO. To adapt to the shift, French hypermarket leader E.Leclerc launched its pet shop division Nos Animaux E.Leclerc and now has more than 40 stores throughout the country.

A 2024 survey, conducted by the French market research firm Ipsos for the brand Bonial, ranked the E.Leclerc as France’s most attractive pet store brand. This is thanks to a good in-store shopping experience and its wide range of products offering good value for money.

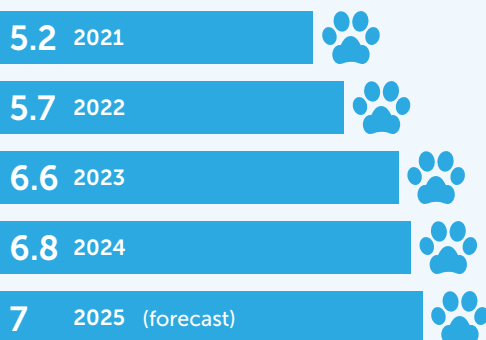
To compete with hypermarkets, Terranimo’s strategy is to give greater customer care: “We can’t offer prices as low as them, but we can offer a better product selection for the pet’s wellbeing,” Lagneau explains.

The brand has grown from 60 shops in 2022 to 85 today, and it aims to reach 100 locations by the end of the year. “We locate our stores next to hard discounters as we have the same clientele: mindful of their budget but with defined needs and a good purchasing power,” is the company’s explanation of its strategy.

Ultra Premium Direct – with 19 shops and plans to open 9 more by the end of 2025 – has its stores in shopping centers to reach people going shopping.



### French pet care market value (in billion €)



Source: Euromonitor International



*Another phenomenon observed in France is the fast development and personalization of pet funerals.*

### Online revenue rises

Online pet purchases, including subscriptions, are definitely on the rise in France. Ultra Premium Direct now has 150,000 subscribers receiving deliveries on a recurring basis, with e-commerce thus representing more than 90% of its total product sales.

Marion Paris, Communication Manager for French pet shop brand Zoomalia, says that “e-commerce remains its top retailing channel and continues to grow”. According to her, this increased tremendously during the COVID-19 pandemic and the online channel continues to offer more product choice, easier price comparison and the practicality of home delivery.

Pet food brand Ziggy mainly sells online and has seen revenues nearly double each year since its launch in 2020. With a turnover of €8 million (\$8.7M) in 2024, it will soon start selling its products in Germany, Spain, Italy and Belgium.

### Gifting and experiences

A 2024 survey conducted by market research company OpinionWay in collaboration with Bonial, found that French pet owners spend a monthly average of €107 (\$116) on pet products. Pet parents aged under 35 spend an average of €150 (\$163) per month, almost twice as much as consumers over the age of 50.

An Ipsos survey shows that 56% of French pet owners buy a gift for their pet at Christmas and 53% do so for their birthday. Clara Zambuto is the founder of Casa Del Doggo, a dog café and bakery in Paris. It sells treats and pastries, and organizes parties for dog birthdays and puppy showers.

“Our clients want to socialize with other pet parents. Dogs can also socialize together by playing and learning to share food,” says Zambuto. Most of her clients are aged 25-35 and spend an average of €12 (\$13) per visit.

“For French people, going to a café is cultural, so they are the perfect target for this business,” says Zambuto. The company made a profit in its very first year and is planning to open a second café in Paris this year.

## French pet population (2025, in million)



Source: Euromonitor International

### Personalized memorials

Another phenomenon currently observed in France is the fast development and personalization of pet funerals. Since 2015, burying animals in gardens has been outlawed (previously, the practice was authorized for pets weighing under 40 kg).

From a 2024 survey, pet funeral home and crematorium Esthima found that a growing number of people have used pet funeral services, representing a rise of 9.6% compared to 2022. “The main trends are personalization and anthropomorphism,” says Marie-Cécile Rochet, Esthima’s Marketing Director. About 80% of its clients request an individual cremation and 40% of them pay for a ceremony.

The company offers personalized products such as pet funeral urns, jewels containing ashes and mortuary toilet. It is the market leader, with a €55 million (\$60M) turnover in 2023. “It is a flourishing market. For a long time, we were the only firm operating in the sector. Nowadays, competition is growing,” says Rochet.

Even though more pet cemeteries are opening, there are still only around 30 in France. “The demand is real. The alternative trend is also to offer memorial gardens for pet parents to meditate following the death of their pet,” says Rochet.

Indeed, according to Ipsos, 69% of pet owners consider their pet as a family member. A figure reaching 84% for respondents aged 25-34. “People want the same thing for their pets as they do for members of their family,” says Rochet, summarizing the French pet owner’s mindset. ♦

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Frédéric Le Guen, CEO, Animalis

## "Our goal is to match Amazon's delivery times"

With the backing of new shareholders Emefin Group, this French business now has the means to reinvigorate its brand and take on fresh challenges.



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

When it started out in 1996, Animalis was a pioneer of pet retailing in France. CEO Frédéric Le Guen joined the company in 2022, which he describes as having become by that point "not very dynamic".

When he took on the role, there were 40 stores across the country, all of which had been there for a while, and no new locations were being added. Now, Animalis has embarked on a full-speed journey, opening a store every 2 weeks.

### *What's it like operating in one of the biggest markets in Europe?*

The French pet market is big, but a very competitive environment. It's a sector where grocery, hypermarkets and supermarkets are the strongest. You also have

quite a few successful pet specialists, strong pure players acting on a global scale, such as Amazon, or on a European scale, like Zooplus, but you also have very strong French pure players.

Additionally, there are garden centers, which aren't so common in other countries but have an important presence here. It's a very dynamic but very competitive environment with strong and successful competitors. So, to win market share, you have to be smart, execute well and be better than the others. It's really a challenge.

### *How has Animalis navigated such a competitive landscape?*

The good thing with a journey like the one we've been on with Animalis is that we've had the opportunity to modernize a lot and move forward. Every time we think of something, we consider how we can differentiate ourselves.

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*"People don't want to trade off on food, but they're making accessories, toys and things like that last longer."*

Online has been a challenge, but overall the competitive landscape is not an easy one. We have to move fast and execute excellently. We have quite a few cards to play. Our belief is that the omnichannel experience is what will help us win in this retail landscape.

#### ***Is the online channel important for pet retail?***

Online penetration is about 16%, depending on the surveys, but it's similar to other categories that were where we are about 10 years ago. This will likely double over time. Although it's not growing as fast as we've seen in other markets, there's no question it will become very important. So, we must be part of that growth and see it as an opportunity.

#### ***In what way is Animalis embracing this potential growth?***

The customer is not only online or in one store, but they are everywhere. And we aim to be where they are and offer what they want. We already offer a broad range of services compared to our competitors. For instance, we've had click and collect for a long time, which is not yet offered by all market players.

We've just launched a new service that allows us to ship products directly from our stores within 24 to 30 hours. We've started with 8 stores, and we're going to continue rolling this out. Currently, we're the only one doing this, and it's a key part of our strategy to be faster and more efficient than our competitors.

#### ***Do you have a specific target for expanding the new service?***

Our goal is to match Amazon's delivery times. We don't know exactly how many stores we'll need to reach that, but our starting point is what the customer needs. The customer demands fast, efficient delivery and a wide range of products. We will have close to 20,000 SKUs from our web catalog. So, our target is to meet the customer's needs, not just a specific store count.

#### ***What does your store layout look like?***

We've developed 2 main formats: the traditional retail park format, which is about 600 sq m and offers a wide range of products, including small animals and fish. Then we have an urban concept with stores of around 250 sq m, focusing on dogs and cats, with no live animals.

We are opening stores in a 50/50 split between these 2 formats, depending on the location. The urban concept is particularly important, because location is a key driver for customers choosing where to shop. Being close to the customer is crucial.

#### ***How different is your strategy for the product offering in smaller locations?***

In urban stores, we prioritize dog and cat products first and foremost. Aquaristics and small animal products are on sale, but the selection is more limited. We focus on the 80/20 of what customers need and ensure that we can ship anything else directly to their homes. Despite the smaller size of urban stores, we've been able to optimize the space and provide a strong selection of products for dog and cat owners.

#### ***Inflation in the category seems to be on a downward trend...***

The first thing I did 3 years ago was to lower prices, because we were not competitive enough. Animalis was a retailer that belonged to the higher-priced end of the market and that was very harmful to the brand.



The first thing we did was to start matching our competitors. We had no intention of being the first to lower our prices, but we want to make sure that we're as competitive as everyone else, or as the most competitive player in the market. Otherwise, I think you gradually face a major problem.

At the same time we had inflation, so you can imagine it was very hard on our margin. It was a bit of a challenge – and still is – because while everyone was increasing their prices, we were lowering them. But I think that was the right thing to do, and the result is that we've almost tripled our market share since 2022.

**Could you tell us something about your range of own label products?**

Inflation and overall economic conditions in France have slowed down customer spending. One trend we've seen is a move toward own label products, particularly when big brands had huge price increases. That's been positive because we have a very wide range of own label options, covering every price quartile, from entry level with fresh meat and antioxidants up to premium products.

Another challenge we've seen is with non-food items. We're growing, but it's been more challenging this year than last year. People don't want to trade off on food, but they're making accessories, toys and things like that last longer. They're also more cautious about impulse purchases. To address this, we've launched a broad range of own label products, even in non-food items, to stay competitive across all price ranges.

**How much does private label or own label represent in your Animalis sales?**

Not enough. But we believe that own label should never be more than 50%, and should even be slightly less. National brands bring innovation. They are great brands with great ideas. As a retailer, our duty is to distribute them, bringing those innovations to our customers. We want a balanced environment between own label and national brands.

***"We've been opening 30 stores every year for the past 2.5 years, and now have 90 stores. We plan to continue doing that."***



Our plan is not to go fully own label. No one does that. We believe that by being a better shop window for national brands, we'll always have more of them than our competitors. We also need to provide good value for the customer. Private label helps with loyalty, because a customer can shop elsewhere for a national brand, but with an own label product, they're more likely to return to us.

***We've seen how cultivated meat is entering the pet food market. Do you see Animalis having these types of products on the shelves any time soon?***

We are looking at it, but we haven't seen a great demand yet. As soon as it picks up, we'll be there too. It's a matter of priorities, but if it's successful in other markets, there's no reason why it wouldn't work in France eventually.

***One of your competitors, Maxi Zoo France, plans to open 65 new stores this year. What's your strategy when it comes to expanding your location count?***

We've been opening 30 stores every year for the past 2.5 years, and now have 90 stores. We plan to continue doing that, possibly accelerating. So, whether it's 30 or 40 stores, we'll keep developing. Our strategy is simple: we want to be where the customers are.

I don't want to open so many stores that we get it wrong. If you open a lot of stores, you can make mistakes in location. We're not in a position to make too many mistakes, so I'd rather have the right 40 stores than open too many and have to close them again due to poor location decisions. ♦

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## SCIENTIST FORMULATED



# Makers of smart collars aim for wider reach

Could the launch of 2 innovative products for dogs in a potentially lucrative area of pet care kickstart sales through mainstream channels?



**Alan Martin**  
*Contributor*  
*PETS International*

Over the past decade, wearable technology has become big business – first for humans and now for pets too. Fortune Business Insights valued the global pet wearables market last year at \$3.7 billion (€3.4B), a figure forecast to nearly triple in the next 7 years, hitting \$10.4 billion (€9.6B) by 2032.

## Futuristic vision

At this year's Consumer Electronics Show in Las Vegas, 2 companies were pitching upcoming smart collars to try and get a slice of this pie – Traini and SATELLAI – and both lean heavily on artificial intelligence (AI).

Traini aims to do something that sounds like it's straight out of science fiction: to offer a real-time translation of dog moods. This uses a combination of bark analysis and vital sign tracking via sensors on the collar itself.

"Right now we are building a cutting-edge supervisor model that can translate dog behavior into human language," Arvin Sun, co-founder and CEO of Traini tells PETS International.

"It's hard to understand exactly what the dog's expression [means], right? So once we can make it happen, I think it's not hard for us to sell the products."

The smart collar, planned to launch this spring, builds on the Traini-Dog iPhone app, which already has 500,000 downloads. Sun says it currently supports 120 breeds – a figure which will rise to over 200 by the summer – and the accompanying collar will have a battery that lasts for a week between charges.

Sun is already thinking about a possible second generation that will use the sensors in the collar for much more than just emotional analysis. "Along this path in the near future we can extend into health monitoring," he says.

[▶ SEE NEXT PAGE](#)

### All-in-one monitoring

SATELLAI, meanwhile, already sees health as one of the potential benefits of its upcoming smart collar, due to be released later this year. "We're putting a lot of demanded features in the market into one device," says David Teaster, Product Marketing Director at SATELLAI.

That means the collar should feature virtual fencing, location tracking, activity monitoring and health tracking, while still only needing charging every 5 to 7 days.

"We've got activity monitoring, which eventually we plan to level up into health monitoring, where it can give specific insights into all the details about your dog, the respiration and stuff like that," Teaster explains. "But I think, initially, the early version is still probably going to be [focused on] just how active your dog is and how much rest your dog is getting."

### Size issues

AI plays a part too. Teaster says: "We're integrating AI consulting so that you can ask questions with a chatbot about dogs. Initially, it'll probably be mostly based on breed characteristics, but as the database builds out, we'll be able to have more specific and detailed consulting in that regard."

One problem that smart collars sometimes run into is physical size, mainly due to the fact that they need 2 types of transmitters, one for long-term evolution (LTE) and one for satellite signals. All these sensors, and a battery with enough capacity to power them, take up space. For that reason, SATELLAI's debut product will be for larger dogs only: those with neck sizes of around 33-76 cm.

Like Sun, Teaster is already considering future products and possibly an entire smart ecosystem for dogs. An activity-tracking collar could link to a smart dog feeder that measures how much food is eaten, for example. That could, in turn, help guide nutrition and health recommendations.

### Retailer reluctance

These innovative dog collars offer different focuses that could be just the thing to push the industry to meet the potential it shows in the Fortune Business Insights forecast. Yet it may not be quite that simple.

***Fortune Business Insights valued the global pet wearables market last year at \$3.7 billion (€3.4B), a figure forecast to nearly triple in the next 7 years.***

Current smart collars tend to be sold directly by the manufacturers or via their Amazon storefronts. Traditional pet stores – both online and bricks and mortar – appear less interested, with virtual and real-world shelves overwhelmingly stocked with mostly traditional tech-free collars.

That includes 2 of the largest pet store chains in Europe, both of which declined to comment on their reasoning when approached by PETS International.

### Price sensitivity

One possible reason for this lack of interest is price. No recommended retail price had been decided by SATELLAI at the time of writing, while Sun has speculated that Traini's debut collar would go on sale for over \$500 (€460).

The pricing obstacle might not be insurmountable. After all, expensive phones, smartwatches and fitness trackers for humans were once also absent from supermarket shelves, but after they reached a sales tipping point, retailers followed. It remains to be seen whether smart collars are on a similar trajectory. ♦





Fiboo POLAND

# How Fiboo is leading the way in eco-friendly pet accessories

As eco-conscious consumers seek sustainable choices, Fiboo is redefining pet accessories with innovative, recyclable and locally manufactured designs.

In a world where sustainability is becoming a key aspect of business, Fiboo stands out. All products from this Polish manufacturer of innovative pet accessories are 100% designed, tested and manufactured in-house, ensuring the highest quality and full control over every stage of production.

The brand creates functional, stylish products while prioritizing sustainable development and a closed-loop production system, setting new industry standards.

## Sustainable production and ecology

From the start, Fiboo's mission has been to create a line of products that meet the needs of pets and their owners while being environmentally friendly. Many of the brand's accessories are made from recycled materials, with up to 70% recycled content. Besides significantly reducing virgin plastic use, this also cuts down on waste.

The entire manufacturing process takes place in Poland, which helps reduce the carbon footprint associated with

transporting raw materials and finished products. Additionally, all of the brand's products are 100% recyclable, following circular economy principles. Once they reach the end of their lifecycle, they can be recycled and converted into new pet accessories. This approach lessens the environmental impact and promotes responsible and conscious consumption.

## Innovative, stylish and functional

Fiboo offers a wide range of innovative pet accessories, including licking mats, slow feeders, toys, bowls, mats for bowls, brushes and eco-friendly waste bags. Each product is carefully designed and tested to ensure the safety and comfort of pets while meeting the needs of their owners.

What sets Fiboo apart from the competition is not only the use of eco-friendly materials and a closed-loop production system, but also the unique design that ensures the brand's products blend seamlessly with modern interiors.

This is in line with Fiboo's aim to make pet accessories both functional and aesthetically pleasing.

## Expanding across Europe

To meet the increasing demand for eco-friendly pet accessories, the brand continues to develop new, sustainable accessories, collaborating with experts and customers to ensure innovation and adaptability.

Based on ongoing success, Fiboo is expanding its presence in European markets. Its products are now available in several European countries. And the company is also **seeking new distributors** who share its values and commitment to sustainability. ♦

**Zoomark: Hall 26, Booth C87**

**Fiboo**

*[fiboo.pl](https://fiboo.pl)*





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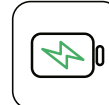
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# Today's tech for keeping dogs safe outdoors

As smart collars become more popular and widely available, manufacturers that focus on the specific needs of pet owners stand out in the market.



**Jen Sotolongo**  
Contributor  
*PETS International*

The integration of advanced technology into pet care has revolutionized how owners monitor and ensure the safety of their dogs during their activities. More and more of them consider GPS collars essential tools, thanks to tracking, safety features and smart fencing capabilities.

## Enhanced location accuracy

Recent advances in GPS and cellular technology have significantly improved the functionality of GPS dog collars. Modern tracking collars now offer enhanced GPS accuracy, real-time location tracking and the setting up of boundaries, allowing an owner to monitor their dog's location at all times.

Texan wireless dog collar brand Halo continually updates both the hardware and software of its devices, offering advanced technological services. One such feature in its fourth-generation smart collar is a dual-frequency GPS dog fence, which combines data from L1 and L5 bands.

"The Halo Collar is the first and only dual-frequency dog fence, which results in unrivaled accuracy," says Michael Ehrman, co-founder of Halo. "This provides for the most accurate location that is not impacted by obstacles, even in urban or bad signal areas."

## Remote contact

Similarly, SpotOn Fence has introduced the Universal SIM card in its Omni Edition collar, allowing access to any cell tower, regardless of carrier. This results in better connectivity and tracking reliability.

The New Hampshire-based brand also offers an 'off-grid mode' that allows owners to create custom fences without relying on cellular signal.

"Even in the most remote locations, hours away from service, you can still set up safe zones for your dog, giving you peace of mind no matter how far off the grid you go," says Sung Vivathana, VP of Engineering for the SpotOn Fence brand. The company created this mode for customers who enjoy camping or exploring in areas without signal.

► SEE NEXT PAGE



***Halo relies heavily on customer requests and collects daily diagnostics from each collar to increase product performance.***

### Designating no-go zones

In response to customer requests and needs, manufacturers have integrated several safety features into their GPS collars. For instance, SpotOn collars offer 'keep out zones', allowing owners to create no-go areas that prevent dogs from entering potentially hazardous locations like frozen ponds, gardens and construction sites.

In the event of a lost dog, SpotOn's Escape Monitoring and Prevention feature tracks and preempts escapes using the 'dynamic dog timeline', which records a dog's exact movements during an escape. Customer data has revealed that SpotOn systems successfully keep dogs contained 99.3% of the time, with a 0.7% escape rate. "What's even more impressive is that 92% return within 5 minutes, demonstrating the system's effectiveness in real-world scenarios," says Vivathana.

### Collars that issue commands

Halo has seen success with its smart collars via its philosophy of not just tracking lost dogs, but preventing them from running off in the first place. It does this with a combination of commands, ultrasonic sounds and vibrations delivered through the collar itself, using the same training techniques humans have used with dogs for centuries.

Once the boundary is set, built-in GPS keeps an eye on where the dog is, so it can respond in real time. "If your dog gets near the boundary, the collar issues the command," Ehrman explains. "Your dog knows what that means: 'stop and turn around'. If for some reason it leaves the fence, the collar will automatically trigger another command that says, 'come home'."

### Prolonging battery life

With growing pet humanization, owners are increasingly prioritizing the safety and wellbeing of their pets, leading to a surge in the adoption of GPS dog collars. All these owners are looking for durable and reliable products with long-lasting batteries.

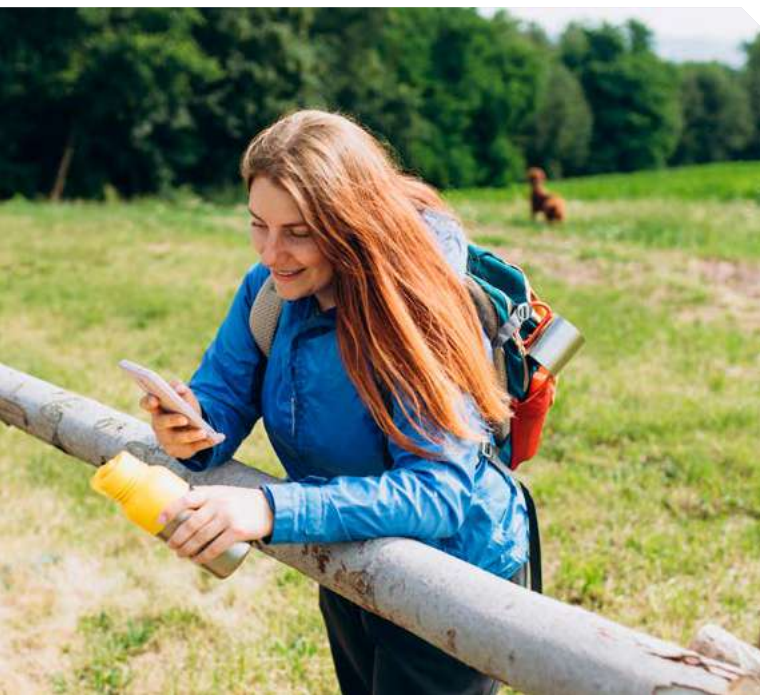
Trends also show an increase in pet parents traveling with their dogs and seeking premium products that ensure their pet's safety. "These shifts have led to the growth of pet tech and companies aligning with the needs of today's younger pet parents, who value travel and experiences with their dogs but will not sacrifice their dog's safety," says Ehrman. "Pet parents are willing to spend money on safety technology."

Halo relies heavily on customer requests and collects daily diagnostics from each collar to increase product performance, ensuring devices are working properly and keeping dogs safe. The company debuted in 2020, and the 4 versions it has produced since then show just how quickly technology can be streamlined between generations. The current version not only introduces dual-band GPS, but offers 50% more battery life, while managing to shrink its physical size by 35%.

SpotOn has introduced an extended battery life mode for using the collar with a tracking subscription. This tracks for over 35 hours on a single charge, adding an extra 10 hours of use to the standard runtime. Even for users without a subscription, the latest app update optimizes battery life to over 40 hours, making the system adaptable for longer outdoor adventures.

### Further AI possibilities

The outlook for outdoor pet products, particularly GPS dog collars, is one of continued growth. Anticipated advances include the use of artificial intelligence (AI) in the technology, as well as increased cost effectiveness and ease of use for the owners.





Manufacturers such as Halo are expanding the use of AI to develop new features and functions, aligning with the evolving lifestyles of modern pet owners. "AI is already a significant part of the Halo product, and we will continue to expand our use of AI to deploy new features and functions to our existing and future users," says Ehrman.

### **Adding extra value**

With enhanced features and ever-changing technology, cost is also a concern for pet owners considering purchasing a GPS collar for their dog. Halo aims to provide substantial value to its members relative to subscription costs. The company focuses on enhancing the daily value users receive, such as adding seamless global cellular roaming without additional subscription fees.

***SpotOn collars offer 'keep out zones', allowing owners to create no-go areas that prevent dogs from entering potentially hazardous locations.***

SpotOn emphasizes customer flexibility by offering collars that function with or without a cellular subscription. "Whether or not [owners] opt for the subscription, [they'll] still receive unlimited fences, a complimentary training session and all the support that our subscribed users enjoy," says Karen Polcaro, VP Marketing at SpotOn.

### **Responding to users' needs**

To facilitate use, Halo has introduced an 'auto-fence' feature that enables users to create custom, safe and effective fences with just a single button press. This innovation simplifies the process for pet owners, thus enhancing the overall user experience.

The integration of advanced technology into GPS dog collars has significantly improved outdoor experiences and safety for dogs and their owners.

With continuous innovations addressing consumer demands for accuracy, safety and convenience, the future of GPS dog collars looks promising as it caters to the evolving lifestyles of modern pet parents. ♦

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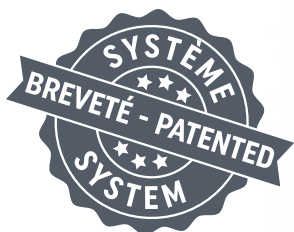
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# Elevating the everyday dog walk

Pet owners want only the best for their companions. Increasingly that means they're looking for accessories such as collars and leashes that are practical, stylish and eco-conscious.



**Ivana Crnec**  
Contributor  
*PETS International*

Gone are the days when collars, leashes and harnesses came in nothing other than standard designs. With pet humanization as cultural zeitgeist, the expanding pet industry is creating new trends, including luxury, personalized and sustainable dog walking essentials.

## Pet haute couture

Many of today's pet owners want their dogs in particular to look fashionable, so collars, leashes and harnesses are shifting from functional accessories to stylish statement pieces. To successfully navigate the shift, pet brands are launching luxury lines, while human fashion labels are venturing into the pet industry.

"We're seeing evidence of this, as renowned luxury brands like Louis Vuitton and Hermès are expanding their offerings with more pet-related products, to cater to the demands of their high-end clientele," says Ellie Liu, Director and Designer of BONDIR, a Chinese luxury brand that has broadened its high-end women's fashion design portfolio to include items for pets.

"This trend highlights the growing prominence of pets in affluent households," Liu adds. At the same time, Fashionbi, which provides data and insights for the

fashion and luxury industry, notes that "pet collections have become more inspiring than kids' fashion now", and Vogue has proudly launched its Dogue series, which elevates pet fashion to art.

## Lifestyle accessories

Label-loving fashionistas don't mind spending a substantial amount of money on a luxury collar, harness and leash. That's simply a natural extension of the high-end pet owner's lifestyle.

"We've seen growth in sales of all our collections. We are now a point of reference in the luxury pet market," says Simone Pierattini Fammoni, creator of EMMA Firenze, an Italian brand specializing in luxury pet product manufacturing.

"Our best-selling line is the Nubuck, a complete collection that includes products such as collars, various models of leashes and harnesses. The countries where we work best are in the Far East, the US and Northern Europe," she adds.

## Customized and handcrafted

Personalized pet fashion is trending and set to reach new heights in 2025. Personalization as a standard is flooding the collar, leash and harness sectors. Owners want their pets to express their individuality and stand out from the crowd.

[▶ SEE NEXT PAGE](#)



Customization in the past focused on functional features such as easy on/off buckles, escape-proof mechanisms, additional padding at critical areas such as the neck or chest and – in more recent times – tech-enabled gadgets, including GPS trackers and health monitors.

Today, custom-made collars, leashes and harnesses are designed and often handcrafted exclusively for the specific needs of a single pet. Embroidered names, laser engravings, tag accessories, stamped leather and unique designs are all selling well. Competition, however, is fierce.

“It’s hard to compete against pet accessory mass producers. They invest hugely in marketing on Google and social media, whereas the real handcrafters invest time and skill in creating unique custom products,” says Milena Marjanovic, Brand Manager at Sauri, a Serbian brand producing personalized and custom-made leather collars.

### Material considerations

A single non-eco-friendly collar needs more than a century to fully decompose. With over 10s of millions of collars made yearly, the magnitude of the issue is striking. Not to mention the effect of poor-quality materials on the pet’s skin.

“So many vets and pet owners focus on what the animal eats – which is of utmost importance – but do not consider what is placed on their best friend’s body,” says Wendy Schuchart, owner of The Good Dog Company, a sustainable brand making leashes, collars and harnesses from hemp and organic cotton in the US.

Luckily, this is changing. Sustainability as a movement is not only influencing the global pet industry, but also reshaping the collar, leash and harness market. According to Euromonitor International’s Global Lifestyles Survey data, 70% of pet owners emphasize how important it is for them to purchase environmentally friendly or sustainable pet products.

UK-based Saffron Pawtique makes collars from corks, while its local competitor Oh Heck uses 100% recycled plastic. Canadian brand Little Pine offers collars and leashes made from discarded climbing ropes and

***Personalized pet fashion is trending and set to reach new heights in 2025. Personalization as a standard is flooding the collar, leash and harness sectors.***

ski instructor uniforms. Melinda Lopez, founder and Director of Little Pine, explains: “By repurposing high-quality materials that would otherwise go to waste, we provide an eco-conscious alternative to traditional pet accessories.”

### Resonating with millennials

Millennials are now a substantial pet-owning demographic. A survey carried out by Ipsos, on behalf of Mars, at the beginning of 2024 among more than 20,000 dog and cat owners in 20 countries, indicates that over 40% of this group of pet parents see their pets as the most important thing in their life.

Brands offering luxurious, customized and sustainable collars, leashes and harnesses therefore see millennials as their main target audience. Both millennial and Gen Z pet owners value recommendations from social media, as well as from friends and family members, so to reach as many of these potential customers as possible, brands need well-thought-out advertising strategies.

“We listen closely to direct and indirect requests from potential customers,” Pierattini Fammoni explains, while according to Marjanovic “word of mouth is an important sales funnel”.

Alex Frith, PR Manager at Charley Chau, a UK brand of luxury dog products, says: “Our net promoter score has been at 100 for over 5 years now. Our focus is always to keep pushing the boundaries and building our reputation for outstanding quality.”

Collaborations are vital, too. “Innovations, paired with high-quality materials and fashion-forward craftsmanship, help us maintain partnerships with premium European retailers and expand our visibility in key markets,” says Alicia Lorsch, Wholesale Director at Cloud7, a German brand that makes luxury, personalized and unique pet products, including vegan leather collars. ♦

**LitPet**  
HONG KONG & UNITED KINGDOM

## Integrating traditional Chinese medicine: the Asian secret for pet wellness



**LitPet stands out with its holistic solution to help pets thrive: combining modern science with traditional Chinese healing practices.**

With pets increasingly moving from sleeping by the door to curling up on their owners' beds, it's evident that pet wellness is more valued than ever.

For example, the European pet supplements market is projected to grow from \$259.8 million (€240.6M) in 2024 to \$426.74 million (€395.25M) by 2032, at a compound annual growth rate (CAGR) of 6.4%, according to Credence Research.

LitPet recognized this trend early, integrating traditional Chinese medicine (TCM) with modern pet care to offer pets a holistic path toward longevity and vitality.

### Harmonized philosophy for pet health

TCM is based on the principles of Qi (vital energy) and the balance of Yin and Yang within the body. These are all critical elements for optimal pet health.

When properly harmonized, Qi is essential for digestion, immunity and energy. In TCM, Yin represents calm energy that is always present, rooted, slow and steady. In contrast, Yang, as modern science highlights, embodies

fast, actively changing energy that moves forward to prevent stagnation. This dynamic flow of vitality provides energy and movement.

Interest in TCM for pets has surged globally, with searches in veterinary literature increasing by more than 1,000% from 2011 to 2020, according to PMC NLM. This shift in pet care philosophy reflects a larger trend of pet owners seeking preventative and holistic wellness practices that go beyond traditional veterinary care.

"We're witnessing a fundamental shift in how people think about their pets' health," says Stephen Hu, founder of LitPet. "Pet parents want solutions that don't just treat symptoms, but support long-term wellbeing."

### Enhancing modern care with ancient wisdom

LitPet emphasizes complementing rather than replacing traditional veterinary medicine. The company's supplements address both symptoms and underlying health issues, promoting a balanced approach to pet wellness. "Most pet parents don't know where to begin with

concepts like Qi flow or ingredients like chicory root extract," explains Stephen. "Our platform translates these ancient traditions into practical, science-backed wellness solutions."

### What sets LitPet apart

At LitPet, precise formulation is essential. Combining traditional wisdom with modern veterinary science, the ingredients are carefully balanced to ensure products deliver effective results without harmful excesses.

Recognizing that even natural ingredients can be unsafe at high dosages, the company maintains strict quality control standards for safety.

LitPet is dedicated to supporting pet owners who prioritize prevention over quick fixes. "What makes me most proud is seeing pets thrive when owners combine modern veterinary science with 3,000 years of healing wisdom," says Stephen. "That's optimal medicine." ♦

**Zoomark: Hall 25, Booth A102**

**UK LitPet Biotech Co.Ltd.**  
[www.litpet.co](http://www.litpet.co)



## Rinaldo Franco Spa ITALY BiscoRe dog biscuits: natural, delicious and made in Italy

Record BiscoRe dog biscuits, proudly made in Italy, are the perfect treat for your furry friend. Available in 11 irresistible flavors, including unique fruit puree varieties, these biscuits cater to even the pickiest pups.

Crafted with high-quality, natural ingredients, free of preservatives, palm oil or added sugars, ensuring a healthy snack option.

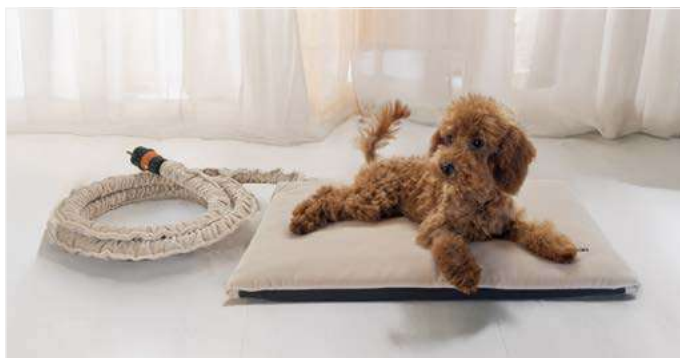
Each biscuit is shaped into a fun and playful design, making treat time even more enjoyable for dogs and their owners alike.

With vibrant, eye-catching packaging, BiscoRe biscuits stand out on store shelves, capturing attention instantly.

Used as a reward or a daily treat, these treats combine taste, nutrition and quality, reflecting the excellence of Italian craftsmanship.

**Zoomark: Hall 26, Booth B71, 72, 75, 76, 78**

**Rinaldo Franco Spa**  
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## Pet Creation ITALY Innovative products for the wellbeing of pets

Pet Creation's unique pet products are made from high-quality materials like Silver Coolmax®, PyroTex Medic® and Resistex Bioceramic, providing antibacterial, virucidal and anti-inflammatory benefits. Crafted with Italian craftsmanship, they create dog beds, memory mattresses, heating bases, covers, carrier bags, coats and bandanas. The Comfort Pet Bag is also a bed with a removable mat, safety devices and comfortable antibacterial, therapeutic materials.

**Zoomark: Hall 29 MALL, Atelier 11**

**Pet Creation Srls**  
info@petcreation.it  
petcreation.it



## Farm Company ITALY A fresh summer with Farm Company

Farm Company presents its new summer collection. The range of cooling pads has been revisited and will be available in 5 stylish patterns: maioliche, summertime fresh, citrus, flamingos, and kawaii. The summer offer also includes funny goggles, carrier bags, silicone bottles, collapsible bowls, colorful poo bag dispensers, and breathable harnesses in various colors and patterns. Download the 2025 summer catalogue at farmcompany.it.

**Zoomark: Hall 25, Booth C81**

**Farm Company Srl**  
info@farmcompany.it  
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## A.K. for Pets NETHERLANDS Quapas! cat litter

Quapas!, trusted in 12 countries, introduces Quapas! cat litter – a circular, eco-friendly solution and a game-changer for cat owners. With superior odor control, easy cleaning and long-lasting freshness, it enhances pets' environments while supporting sustainability. Visit the company's booth at Zoomark to learn more about this innovative product and discover how Quapas! is revolutionizing the cat litter industry with its green, game-changing solution.

Zoomark: Hall 22, Booth B05-C10

**A.K. for Pets BV**  
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akpets.com



## Petking SPAIN Innovation and quality in pet products since 2016

Beds, mats and accessories for dogs and cats – comfortable and stylish items for pets. Seasonal designs offer a wide range for all tastes and needs, with over 2,000 references. The company specializes in the pet sector with 2 lines: Petking, covering pet textiles and food, and Nunbell, the accessories line, including walking, transport, safety, grooming and toys.

Zoomark: Hall 16, Booth E02

**Petking Land S.L.**  
export@petking.es  
petking.es/en



## Suziria Brands UKRAINE The Half&Half brand continues to conquer the European pet food market!

Half&Half is a premium pet food brand for mindful pet owners with a recipe free from chicken. Dry food contains only valuable protein sources: beef and turkey.

The formula supports the musculoskeletal system and includes superfoods and farm vegetables for a balanced diet. Cat pouches contain over 85% meat, along with taurine, vitamins and essential trace elements for optimal health.

Half&Half is the first Ukrainian brand to win the Gold Pentaward for Best Packaging Design, created by the DOZEN agency. The design reflects the human-pet bond with the slogan "Two halves – one life". The brand is now available in Poland, the Czech Republic, Slovakia, Romania, Serbia, Croatia, Bulgaria and Hungary.

Suziria Brands will participate in the Zoomark exhibition in Bologna, showcasing Half&Half and other brands.

Zoomark: Hall 29 MALL, Booth A21-B18

**SUZIRIA PL LLC**  
export@suziria.ua  
export.suziria.ua

A new production line for production of extruded pet food was successfully launched at the Danube Petfoods factory.

In addition to the existing cold-pressed food production line, a new, high-capacity line for extruded food was added. The production capabilities have also been expanded to include the processing of larger quantities of fresh meat.

With over 30 years of experience, family business Danube Petfoods markets pet food of the finest quality. Its in-house brands, such as KUDO and WILDFULL are sold in most European countries.

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## ADVANTAGES OF THIS TECHNOLOGY

Besides other advantages, one of the most important benefits of cold press technology is the way that cold pressed kibbles disintegrate in the stomach of our pets. Once they get into the stomach, cold-pressed granules do not swell but dissolve very quickly.

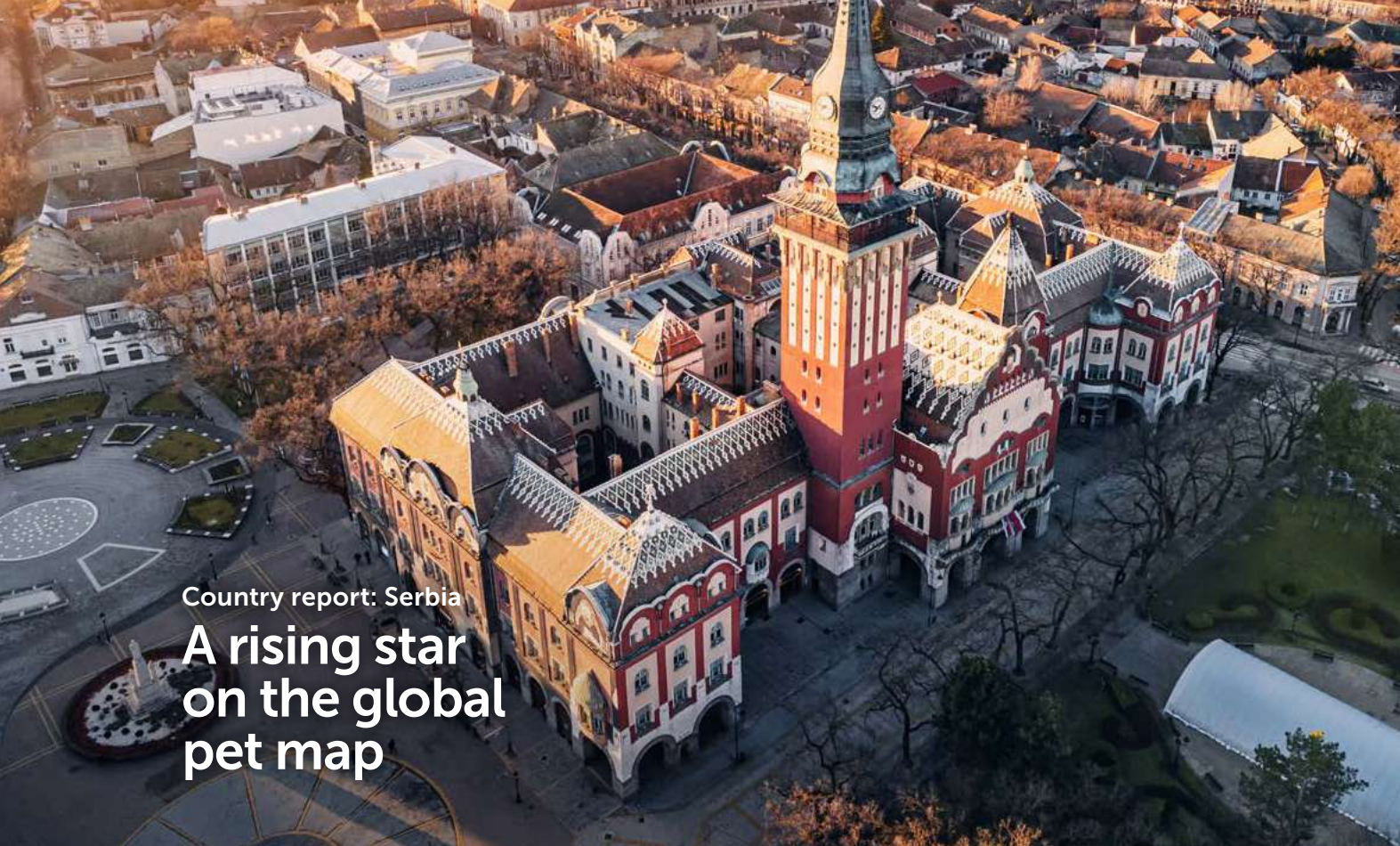
Dissolved high-quality food ingredients are much more easily absorbed by the organism.

Kudo cold-pressed food is used in portions which are by up to a third smaller than the portions of extruded dog food.

## COLDPRESSED DOG FOOD







Country report: Serbia

## A rising star on the global pet map

**With the Serbian economy – and its pet segment – experiencing exponential growth, the country seems to have unlocked the secrets to export success.**



**Marko Čadež**

*President, Chamber of Commerce and Industry of Serbia*

The pet industry is one of the fastest growing segments of the Serbian economy. Food for dogs and cats ranked sixth in the top 10 export products of the domestic agricultural and food sector last year. We take a closer look at what's going on in the nation's pet industry, including some of its most enterprising businesses and innovative products.

### Innovations on the world stage

Although many pet owners don't realize it, numerous novelties on offer around the globe originate from Serbia. Take for example the world's first juices for dogs. Produced by King's Choice, these juices are made of pineapple, raspberry and blueberry, without sugar but with all the valuable natural fruit-based ingredients, and seasoned with the taste of beef, chicken and pork.

Or what about a dessert made of dried apples for cleaning a pet's teeth, or a fresh snack in the form of a 'petite biscuit'? Serbian teams of producers, scientists, veterinarians, and dog and cat owners have incorporated their innovation, creativity, knowledge, dedication and love for pets to bring these and other exciting products to the international pet community.

### Undisputed regional leader

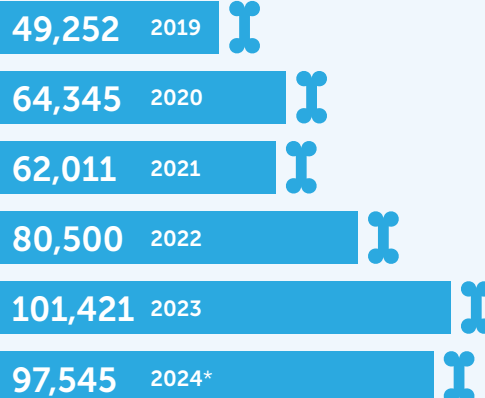
The Serbian pet food industry is one of the fastest growing segments of the national economy, which is experiencing exponential growth. Although the production and export performance of Serbian manufacturers of pet food is not yet on a par with the results of major players internationally, it is the undisputed regional leader.

Moreover, Serbia has already entered the top half of the list of pet food-producing countries in Europe, and is a rising star in the global pet industry. [▶ SEE NEXT PAGE](#)





## Serbian production of dog and cat food for retail (in tonnes)



Source: Statistical Office of the Republic of Serbia  
\*Preliminary data

Food for dogs and cats has climbed the top 10 list of Serbian export products in the agricultural and food industry at incredible speed. In 2024, it ranked sixth after grain (maize and wheat), cigarettes, tobacco and berries.

### Impressive export statistics

According to the database of the Statistical Office of the Republic of Serbia, the country exported pet food worth €179 million (\$193.7M) to the rest of the world last year. This is 70% higher than the export statistics for apples – one of the most sought-after Serbian fruit types on the international market – which stood at €105.4 million (\$114.2M).

The Serbian production of dog and cat food is now almost 390 times bigger than 15 years ago: from 255 tonnes in 2010 to 97,545 tonnes in 2024. In fact, last year's export figures were 25.5 times higher than the €7 million (\$9.1M) achieved in 2011. A decade and a half ago, exports did not even equate to half of imports, whereas today the value of Serbia's exported goods exceeds 60% of the goods the country imports.

### Key pet food producers

The year 2011 is considered the beginning of the rise of the domestic pet industry, because that is when the foundations of the legal framework were established. One of the smaller, specialized producers of pet food at that time was Premil. Since then, thanks to the cooperation with the Dutch company Vobra, it has

grown into a modern factory and one of the largest domestic companies in this area.

According to data from the Serbian Business Registers Agency, there are currently a total of 26 pet food producers in Serbia, including 22 production plants that are approved for export to the EU. Besides Premil, these include Farmina Pet Foods, which is one of the 42 largest European pet food companies measured by export results. Other specialized producers are Agrosava Pet Food and Danube Petfoods.

Indeed, stimulated by profitability and the growth of global demand in this segment in the past 5 years, an increasing number of animal feed exporters – such as Gebi and PatentCo – are adding production lines of food for dogs and cats.

### Expanding export destinations

As the growth of Serbia's pet industry continues to accelerate, the scope of global markets where the nation sells its products is also expanding. In the past decade, the main export markets were countries in the region in the territory of former Yugoslavia.

***Cat and dog food has climbed the top 10 list of Serbian export products in the agricultural and food industry at incredible speed.***

***In the past 5 years, as many as 17 new markets opened for Serbian pet food, including in distant locations such as Latin America and the Far East.***

However, in the past 5 years, as many as 17 new markets opened for Serbian pet food, including in distant locations such as the US, Latin America (Brazil, Mexico, Chile and Peru) and the Far East (Indonesia, South Korea, Japan, Bangladesh and Taiwan).

As a result, according to data for 2024, Serbian dog and cat products were retailed in 55 markets around the world. The major markets are on the European and American continents, where a total of €90.2 million (\$97.8M) worth of Serbian pet food was sold last year, accounting for 68% of the exported total.

In more than half of those destinations, Serbian producers increased their export performance last year. Sales rose by 3 times on the Ukrainian market, and more than doubled in the US – which is the biggest market, accounting for almost a fifth of all Serbian pet product export – as well as in the UK and Denmark.

### **Foundations of quality and research**

So what is the secret behind the growth of the Serbian pet industry? Firstly, it is based on solid foundations: on the traditions of Serbia's agricultural and food industry and its important segment of animal feed production.

Producers also rely on high-quality raw materials – free from genetically modified organisms (GMOs). In addition, they apply the strictest international standards and trends throughout the entire production chain in modern factories, as well as domestic and international research and achievements, and use the expertise of recognized veterinary professionals.

### **Technological hub**

But in the Serbian 'recipe for success', the most important extra ingredient – because it not only explains the past success, but is also a guarantee of future advancement – is innovation. Serbia is a new European technological and biotechnological hub, a center of innovation and knowledge. With the fastest

growing ICT and startup community in Europe, Serbia has been described by the world media as the new Silicon Valley of the Western Balkans.

The nation's businesses are using the economy's number 1 export product – software – in combination with new technologies and artificial intelligence (AI) to create innovations that drive industries forward – and that includes pet food and pet supplies.

### **Serbian pet industry inventions**

One prime example of the country's innovative creativity is the world's first toothbrush for dogs. This invention of the Serbian startup Petsie is already sold in 10 markets in Europe and America.

Similarly, advanced technology has been leveraged in Smarttsy, a 'smart' dog house designed to be placed in front of stores. The temperature can be controlled remotely and a camera allows owners to keep a close watch on the safety and comfort of their dog, resulting in a carefree shopping experience for them.

Last but not least, Belgrade-based startup WellPet.ai recently presented a new smart collar. Supported by an AI data processing platform, it includes a mobile application that translates 'dog speak' into human language.

### **Accelerating startups**

These are just a few of the smart pet products created in Serbia in recent years, and new ones are expected to continue to emerge, especially from the SEE UP Accelerator for pet industry-focused startups.

The first of its kind in the Western Balkans, this accelerator is located under the same roof as the Centre for Digital Transformation of the Chamber of Commerce and Industry of Serbia.

It supports and invests in startups that have market-validated solution. Among other things, the SEE UP Accelerator helps innovative companies to scale up and improve their business, test products on the target market, and network with investors and strategic partners in the pet industry, ranging from pet food and equipment manufacturers to distributors and veterinary chains. ♦

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## Regional report: the Balkans

# Prospects are bright as local players eye global opportunities

With the Balkan nations thriving in many respects, PETS International looks at the similarities and differences that exist between the pet markets in Serbia, Croatia, and Bosnia and Herzegovina from retail and manufacturing perspectives.



**Dušan Raičević**  
*Contributor*  
*PETS International*

Recent history has left its mark on the Balkans, with demographic decline prolonging a period of slow economic growth. The region has now left those challenging and turbulent times behind, however, and according to the latest growth indicators, Serbia, Croatia, and Bosnia and Herzegovina are catching up with the rest of Europe.

### Tipping towards exports

The upswing includes the numbers and the expectations of pet owners, as well as the retail and pet food manufacturing landscape. Additionally, in the import-export balance, there are signs of a trend towards more exports. This makes the Balkan Peninsula

a region to keep an eye on for pet industry players. So what's going on in the region's key countries?

### Serbia

It is believed that 67% of Serbians own at least 1 pet, according to recent findings from online and mobile survey agency TGM Research. Of those, more than 7 out of 10 (74%) have a dog and 45% have a cat. The research concludes that 47% of pet parents own more than 1 companion animal.

The popularity of pet ownership is driving the demand for the personalized services and unique product offerings that small shops can provide. For example, lots of local players are now selling smart devices for pets and branded clothing, but they also have specialized salons intended for four-legged companions.

[▶ SEE NEXT PAGE](#)

### Small shops thrive despite big players

This shift in consumer preferences is allowing smaller establishments to thrive. At the pet shop and veterinary pharmacy Atos and Maša, the focus is on building strong relationships with its customers and offering care tailored to individual needs. "More and more shops are being registered as veterinary pharmacies where they can sell even more products or help pets in need," says Smiljana Vučićević, owner of Atos and Maša.

Another trend is that big pet stores are opening branches in exclusive parts of Belgrade and major shopping centers. But even so, big players don't tend to interfere with smaller shops because they don't have the same target audience. While shopping centers tend to attract lots of tourists and people who don't necessarily live in the city, customers at small retail outlets are usually locals who buy modest quantities of pet food.

### Regional powerhouse for exports

However, not everybody shares this positive attitude. Founded in 1995, Premil is the oldest pet food producer in Serbia. According to its Director Vesna Popović, the company is just too small to compete with the global players.

***A study showed that 46% of Croatian pet owners buy pet food in the country's supermarkets, followed by 28% who choose small pet stores.***

She also says that the company is facing a certain stagnation in the domestic market due to a rapid increase in foreign supply. Perhaps this stagnation at home is driving Serbia's shift towards international expansion.

It has become a regional powerhouse that exports its products to many different countries, not only in the traditional region of Eastern Europe, but also in the rest of Europe and as far afield as the US, Peru, Bangladesh, Taiwan and South Korea. To support its exports to the EU, Serbia is pushing towards GMO-free status, with 19 manufacturing facilities having achieved it.

### Growth set to continue

In an interview with Serbia Business News, Miroslav Zdravković, a prominent economist, highlighted some important facts and figures: "The global economic crisis has not negatively impacted the export of dog and cat food [from Serbia]. On the contrary, exports have surged by 60.6% over the past 6 years, reflecting an average annual growth rate of 8.2%. Additionally, the exports of food for other pets have risen by 65%."

This success seems set to continue. According to market intelligence firm ReportLinker, the Serbian pet food market is projected to hit €271 million (\$295M) by 2028. By the same year, ReportLinker has also predicted that Serbia will export 38.3 million kilograms of pet food – an average annual growth rate of 3.2%.

### Manufacturers with vision

Much of this growth is the result of the strong ambition, creativity and commitment displayed by the nation's pet sector. King's Choice is a great illustration of this. In 2023, the company from Petrovac na Mlavi in the east of the country began production of a specialized juice for dogs – one of a kind on the global market – which it subsequently presented at Zoomark.

Since then interest in the juice has skyrocketed. "Production expansion is inevitable, because once we've conquered the Serbian market, we will focus on other countries as well," says CEO Nikola Gakovac.



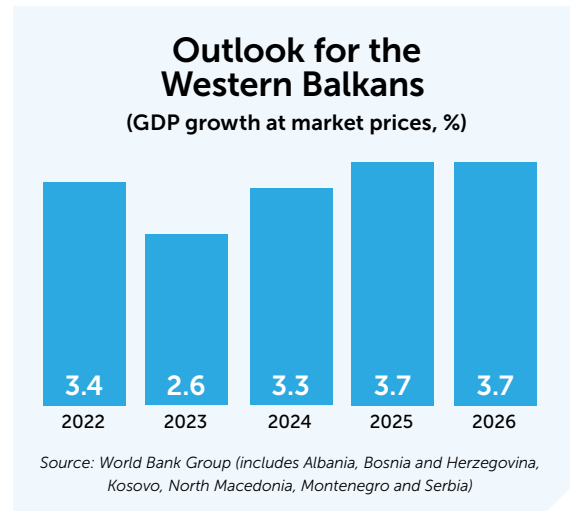
## Croatia

Croatia's EU membership has changed the economic landscape of the country in recent years and the sustainable growth of the middle class has led to a higher percentage of pet ownership. Subsequently, the COVID pandemic caused the number of pet owners to rise even higher. As a result, at least 59% of households in Croatia now have at least 1 pet.

## Evolving consumer preferences

According to a 2024 report on the Croatian pet food market by research and consultancy agency StrategyHelix, the size of the pet food industry will increase by 9% by 2029. This market growth is partly influenced by the variety of sources offering the desired product; consumers now have more choice thanks to modern retail channels and e-commerce platforms, which have been on the rise in recent years.

A TGM research study showed that 46% of Croatian pet owners buy pet food in the country's supermarkets. This is followed by 28% who choose small independent



pet stores/small pet chains, and 21% who prefer to do their shopping online. Additionally, consumers are becoming more open towards buying premium and organic food, signaling growing awareness of pet health and nutrition.

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### Booming domestic market

Mauro Lukić, General Director and co-owner of feed manufacturer Tvornica Dobre Hrane, is optimistic about the future. He says that the domestic market has been booming in recent years, and his company has been able to sell between 85-90% of its entire production.

This surge in the local market is also being noticed internationally. The Ukrainian food and agricultural technology company MHP is investing €40 million (\$43.5M) in the construction of a wet pet food factory in Croatia that will be fully operational in 2026.

### Role of education in retailing

As for the retail business, Pet Centar – part of the Pet Network International Group – describes itself as one of the pet industry's leaders, with a significant presence across the whole country.

"Our advantage is that we are also oriented towards the education of our potential clients. We do that through the workshops that are organized by the company and throughout social media platforms," says Mara Marković, Marketing and Communication Director of Pet Centar.

### Bosnia and Herzegovina

Both the export and import of pet food are continuously rising in Bosnia and Herzegovina. According to ReportLinker, pet food exports will be equal to 4.6 million kilograms by 2028. On the import side, the need for various products will rise to 18 million kilograms in the same period. This is a rather different picture from 2013, when Bosnia imported 90% of all pet food consumed, valued at \$7.5 million (€6.9M).

*The market in Bosnia and Herzegovina still holds room for improvement – the biggest issues are limited distribution channels and high import taxes.*

### Pet popularity on the rise

These trends are testimony to the rise in pet ownership. This is paired with growing consumer awareness that their favorite companions deserve the best-quality products – albeit at elevated prices. The shifting mindset illustrates the increasing versatility of the market compared to previous years.

### A market for premium products

One company playing into the evolving consumer preferences for quality is Agrokomerc, the biggest producer of dry food in the country. The company is an established presence at the Interzoo trade fair, where it displays a wide selection of premium products.

According to the firm's representative, a great deal of effort is also put into the preservation of the environment and support of local communities through various programs.

### Shifting retail trends

Local players are also shaping the shifting trends in the retail industry. For example, Pet City – the biggest pet store chain in Bosnia and Herzegovina – offers full accommodation with a veterinary pharmacy service. Besides obtaining treatment for their pets, owners can also gain useful tips on how to best care for them. The company's marketing team also puts significant effort into its webshop, which provides access to a wide range of premium products.

However, the market in Bosnia and Herzegovina still holds lots of room for improvement. According to Statista, the biggest issues are limited distribution channels and high import taxes.

### Innovation driving expansion

The future of the pet industry in the Balkans looks promising across the whole region. The markets are open to importing high-quality products and there is also a strong foundation for export, not least thanks to an educated and highly engaged workforce, a commitment to quality and the drive to innovate. ♦





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## Gen X: the missing piece in marketing strategies

**The generation of consumers born between 1965 and 1980 offers spending power, brand loyalty and a love for pets. It's time for businesses to wake up to this untapped potential.**



**Stefan Hartung**

*Co-Founder Creative*

*Kick Strategic Creative Agency*

I've spent over 30 years helping brands – including many in the pet industry – connect with their target audiences. Yet as I researched the best pet products for Ludwig, the Tibetan terrier puppy my wife and I acquired recently, I realized that pet brands are fixated on millennials and Gen Z while largely ignoring my generation: Gen X. And that's a missed opportunity.

### **An overlooked cohort of pet parents**

After all, our kids are grown, we're more financially secure than we were 20 years ago and we're ready to invest in premium, top-tier and designer products – including for our pets. So why aren't more pet brands speaking to us?

Gen X consumers are at a completely different stage of life than younger pet owners. We tend to own homes, have established careers and, for the first time in years, we're no longer raising young kids. With this newfound stability comes significant disposable income.

In fact, according to the most recent data from the World Economic Forum (2021), households led by Gen X have the highest average disposable income in the US, while younger generations lag behind. And we are more than willing to spend our disposable income on our pets.

[▶ SEE NEXT PAGE](#)

***Although we didn't grow up with smartphones in our hands, we are tech-savvy and highly engaged online. 80% of Gen X-ers use social media.***



Research by Bloomberg International projects the global pet industry to grow from \$320 billion (€294B) in 2023 to \$500 billion (€459B) by 2030, fueled by premiumization, increased focus on pet wellness and longer pet lifespans. With our financial stability and deep experience as pet owners, Gen X-ers are prime contributors to this boom.

Meanwhile, a Daymon Worldwide study (2018) found that Gen X is more brand-loyal than millennials. 35% of us tend to buy the same brand, compared to just 29% of millennials. Rather than chasing trends, we seek reliability, quality and consistency. But despite our strong purchasing power and loyalty, we're often left out of pet brand marketing. Why?

### Getting to know Gen X audiences

If pet brands are not engaging Gen X, they are missing out on one of the most valuable consumer segments in the pet industry for a number of reasons. Firstly, although we didn't grow up with smartphones in our hands, we are tech-savvy and highly engaged online. 80% of Gen X-ers use social media – with 70% accessing it via a smartphone – and our fastest-growing platform is TikTok. Despite this, most digital campaigns still prioritize younger demographics.

Secondly, Gen X consumers value quality and transparency. We do our research. We want to know where ingredients come from, how products are made and whether they deliver real results. We're won over by substance rather than marketing fluff. And once we find a brand we trust, we're loyal. Earning our trust means gaining a long-term customer.

Thirdly, with our kids out of the house or at least nearing adulthood, we're shifting our focus – and that includes prioritizing our pets. We're willing to spend more on their health and wellbeing because we know firsthand how important high-quality care and nutrition are.

## 4 ways to engage Gen X pet owners

### 1. Rethink your digital strategy

Digital marketing isn't just for younger generations. Gen X and boomers are avid online shoppers and social media users, yet global research has revealed only 13% of us feel represented in advertising.

And despite holding 25% of global spending power, only 4% of people featured in ads are over 60. Pet brands that acknowledge and include us in their campaigns will stand out.

Facebook and Instagram remain our go-to platforms, so these should be prioritized. But remember to also leverage TikTok's growing Gen X audience; it's not just for Gen Z anymore. Moreover, because Gen X-ers engage with brands that offer useful, informative and entertaining content, target them through relatable and transparent storytelling. Share real stories about your brand's mission, the people behind your products and testimonials from loyal customers.

### 2. Emphasize quality and value

Gen X-ers aren't looking for gimmicks; they want proof that a product works. Therefore, highlight premium features and proven benefits. They are also willing to pay for quality, but appreciate value, so offer incentives without cheapening your brand – such as loyalty programs, subscription discounts or well-crafted bundles.

### 3. Align with the Gen X lifestyle

Many Gen X-ers are now prioritizing travel, hobbies and experiences they didn't have time for while raising kids. Offer pet products that fit those interests,

*With our kids out of the house or at least nearing adulthood, Gen X-ers are shifting our focus – and that includes prioritizing our pets.*

such as pet gear and services that cater to an active, flexible lifestyle. Additionally, make shopping effortless, with easy online ordering, seamless subscription services and hassle-free, reliable customer support.

#### 4. Make yourself visible

To build authentic relationships with Gen X consumers, position your pet brand where they will notice you. This can include sponsoring local events such as adoption drives, pet-friendly community gatherings or breed-specific meetups. And of course it includes visibility on social media.

#### It's time for pet brands to start talking to us

There is a massive opportunity for pet brands willing to recognize the spending power, values and digital behaviors of Gen X. We're not just another demographic, we're long-term, high-value customers. Earn our trust and we'll reward you with loyalty. The question is: will your brand seize the opportunity? ♦

#### Why Gen X matters for pet brands

- More disposable income = willingness to pay for premium products
- Higher brand loyalty = long-term customers
- Tech-savvy and comfortable with e-commerce
- Actively engaged on social media, yet underrepresented in digital ads

#### How to capture Gen X-ers' attention

- Offer clear product benefits, not hype
- Engage via Facebook, Instagram and TikTok
- Use real customer testimonials and transparent storytelling
- Provide a seamless online shopping experience, such as subscription options



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# Retailers weigh up lowering prices in uncertain inflationary environment

Price cuts are well established as a promotional tool, but for consumers tired of the effects of inflation such measures may have more impact than in the past.



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

Some retailers in the US and Europe have cut pet food prices at their stores after months of deflation in the sector. They hope this will help to bring back consumers now that the wave of continued price rises across the world has calmed down.

## Expanding while cutting prices

In the UK, Poundstretcher cut the prices of more than 100 pet products, while introducing new items under its Pet Hut brand in February. Jollyes, another UK pet superstore, had already announced price cuts on thousands of items across its stores the previous month, as it prepares to open more locations.

## Making premium less expensive

At the start of the year, online pet retailer Zooplus announced a price cut for its own branded items. "With global supply chain challenges stabilizing, we saw an opportunity to pass on these savings to our customers, especially during a time when consumer prices in other areas of life are on the rise," says the German company.

According to Zooplus, this "allows more pet parents to access premium-quality products, which makes caring for their pets a little easier". The company began its price reduction strategy with cuts on premium food in late 2024, starting with about 400 items from the brands Concept for Life, Smilla, Briantos and Rocco.

This year, it has expanded its cuts to about 1,000 products, which now include the brands Cosma, Purizon and Wolf of Wilderness too.

Cutting costs on premium goods may be more doable than in other categories, as margins are often the largest on the most premium goods.

## Transparent pricing to win loyalty

Founder and owner of Fressnapf Torsten Toeller stated at a conference in Brussels last October that the German pet retailer would implement aggressive pricing strategies to strengthen its market position across Europe, in response to a "slight downturn" in the industry.

The retailer said at the time that the inflationary environment was leading to "more price-sensitive decisions" among its customers.

Fressnapf and Maxi Zoo have enhanced their Friends customer loyalty program by introducing more “appealing” offerings and services to effectively address the situation.

“We expect that an even more transparent price structure can further contribute to customer trust and loyalty, supporting the long-term value and stability of our customer relationships,” a company spokesperson says.

### Deflation in the US

There is some evidence that the decline in pet food prices is a macroeconomic trend. In the US, for example, inflation on pet product sales dropped by 0.9% from December 2023 to December 2024, according to the Bureau of Labor Statistics. That’s significantly lower than the peak of 12% year-on-year (YoY) inflation in November 2022.

It was pet food driving that decline, with inflation in this part of the US pet sector dropping by 1.7% last year. That was low enough to result in deflation of consumer prices for much of the year.

***In the US, the producer prices for dog and cat food increased by 0.8% in the year ending January 2025.***

### Will price cuts persist?

Whether or not price cuts will continue depends on a variety of factors. Data on input prices is not encouraging – showing rising production costs. Producer prices, which measure the sale price received by manufacturers, are ticking up.

Financial statistics bureaus worldwide calculate the producer price index (PPI) to measure the prices that producers receive for their products. Indirectly, it can be used as a window into the rising costs of production.

In the US, the producer prices for dog and cat food increased by 0.8% in the year ending January 2025. This is a significantly cooler increase than the year before, when that number was 5.1%. However, it’s still an increase, counteracting the recent trend of pet food deflation in the country. [▶ SEE NEXT PAGE](#)

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### Effects of global PPIs

While there is quite limited data available on the input prices for pet food specifically outside the US, PPIs around the world showed food price upticks in January. And that could mean higher input costs for pet food manufacturers.

In the UK, overall producer price increases were 1.7% this January. In Germany, these prices are rising faster, hitting a 3.5% YoY increase that same month. In Canada, producer prices in the category of fruit, vegetables, pet food and other food products increased by 2.1% in the year through January 2025.

### Passing costs on to consumers

While an imperfect predictor of consumer prices, rising costs could impact pet food producers, retailers and – eventually – consumers. Generally, producer price increases pass on to consumers over time. However, companies may have some room to negotiate if prices increase further.

***Should producer price increases continue, declining margins are possible, especially for those committed to lowering their product prices.***

Last November, the industry research company IBISWorld said in a report that companies across the pet industry tended to pass costs along to consumers during the most recent inflation wave, “generating steady profit gains at the detriment of overall revenue”.

With many prices remaining high, even after months of pet food consumer price leveling or deflation, companies may have expanded the margins that enable them to ‘eat’ new producer price increases without passing them on to consumers. Should producer price increases continue, declining margins are possible, especially for those committed to lowering their product prices.

United Petfood, for example, has seen rising margins because of inflation. According to an S&P analysis in January, the Belgian private label manufacturer has increased its margins by keeping its prices stable as commodity values have decreased. Companies following this trend may be able to cover future inflationary costs if prices continue to rise. If inflation declines, they can pass those savings on to consumers or keep prices steady to increase margins even further.

### Where to go from here?

Commitment to lowering prices could improve customer loyalty and may be a wise move for companies looking to increase sales volume at the expense of profit margins.

However, some of the recent deflation in pet food prices may well come from increased efficiencies in production, plus other factors influencing prices beyond raw material costs. Those efficiency gains are likely to stay, reducing the impact of price cuts on margins.

Much will depend on the possible inflationary impacts of new trade barriers coming from the US and political instability around the world. For traditional pet retailers, growing competition from companies like Amazon and the Chinese e-commerce titans Shein and Temu may further incentivize cutting prices to remain competitive in an increasingly saturated pet market. ♦





Honkajoki FINLAND

## Innovations in pet food from pure Nordic surroundings



**How do functional proteins and poultry hydrolysates enhance nutrition, flavor and sustainability, while offering significant benefits for manufacturers? Let's find out.**

### Functional proteins

Functional proteins have the potential to revolutionize the pet food industry by replacing non-nutritious carrageenan and other texturizers in moist cat and dog foods. These proteins offer a novel solution for thickening wet food while improving nutritional value and potentially enhancing palatability.

Utilizing pure and unique raw materials, they ensure superior hygiene standards, making them an ideal choice for pet food manufacturers seeking to improve product quality and consumer satisfaction.

### Poultry hydrolysates

Poultry hydrolysates are gaining traction in the pet food industry due to their exceptional protein content and digestibility.

These hydrolysates, derived from poultry byproducts, are broken down into smaller peptides and amino acids, making them highly palatable and easy to absorb.

Their inclusion in pet foods enhances the nutritional profile and improves flavor. The use of poultry hydrolysates aligns

with the industry's shift towards natural, high-quality ingredients.

### Hygiene, health and safety

Honkajoki, based in Finland, will commence production of these innovative pet food ingredients at the end of this year.

Benefiting from Finland's Arctic surroundings, which naturally enhance hygiene, health and safety, the company ensures superior standards in production.

Animals are raised in a low-disease region with a strong tradition of antibiotic-free broiler chicken farming. Finland's strict monitoring and minimal medication use further ensure the superior quality of Honkajoki's pet food ingredients.

### Sustainability

Sustainability is at the core of Honkajoki's operations. The company reports each product's carbon footprint, ensuring transparency and accountability.

Its focus on ISO certifications reflects a commitment to high standards in quality

and environmental performance. Honkajoki sustainably transforms animal byproducts into increasingly high-value pet food ingredients, ensuring full resource utilization.

This innovative use of resources supports the company's mission to contribute positively to the planet while delivering high-quality, sustainable solutions in the protein industry. ♦

### About Honkajoki Oy

**Location:** Finland

**Revenue:** €58.2 million (\$62.2M)

**Ingredients:** 100% sourced from within Finland

**Products:** poultry meal, feather meal, pork meal and beef/bovine meal

**Upcoming products:** poultry hydrolysate and functional protein (poultry) by the end of 2025

**Frontier in sustainability:** carbon footprints available for all products. Sustainability reporting since 2016

**Honkajoki Oy**  
[honkajoki.fi/en](http://honkajoki.fi/en)



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## Obligation into opportunity How the global pet sector is preparing for PPWR

**In February, the EU's Packaging and Packaging Waste Regulation (PPWR) entered into force. But are manufacturers up to speed with the legislation and with consumer expectations?**



**Megan Tatum**  
*Contributor*  
*PETS International*

At times controversial, the PPWR introduces some sweeping changes to the rules that govern packaging across the EU's 27 member states – including a ban on many single-use plastics and stretches to targets on recyclability and reusability. It's set to pose a significant challenge for the pet industry.

### Need for circular design

Currently, it's estimated that some 99% of pet food packaging ends up being thrown away and heading to landfill, rather than being properly recycled or reused. In fact, fewer than 1 in 20,000 of the plastic food pouches typical in the sector are recycled, making them more of a burden than single-use coffee cups,

according to the global network of environmental campaigners Friends of the Earth.

Addressing this will require significant upheaval and investment. One research paper by packaging manufacturer Amcor points out that all pet care packaging would need to be designed 'recycle-ready' going forward in order to comply with PPWR's stringent 'eco-modulation' criteria – or risk facing stiff penalties.

### Looming deadlines

An example of the new regulation is that in the contact-sensitive flexible plastic packaging used by many pet manufacturers of food supplies, the materials will need to contain 10% post-consumer recycled (PCR) content by 2030 and 25% PCR content by 2040. The good news is that the sector does have time to prepare.

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“The PPWR, while [already] in force, will not be applicable before mid 2026,” Franco Garbelotto, Public Affairs and Communications Manager at the European pet food industry body FEDIAF, points out. “Until then, secondary legislation needs to be approved, to clarify crucial aspects of the provisions and enable companies to comply with the regulation. Pet food manufacturers, like any other consumer brands, are preparing for these changes, but we are still in the early stages.”

### Aiming for 100%

What do these preparations look like so far? And to what extent is the sector embracing the change in rules as an opportunity, as much as an obligation? Though we might still be some way off PPWR’s full integration into EU law, many leading pet brands are already making bold commitments that will see them move ahead of the curve when it comes to compliance.

At Nestlé Purina, for example, the brand has set itself an ambition to ensure 100% of its packaging will be reusable or recyclable by the end of 2025. It says it aims to reduce the use of virgin plastics by one third during the same time period.

“We are working on reducing both the number of different material layers and the complexity of those materials to make our packaging easier to recycle,” says the brand. Recent innovations have included a new simplified pouch packaging structure for its Gourmet Mon Petit range and Felix soups, which are now using a single material to make them more easily recyclable.

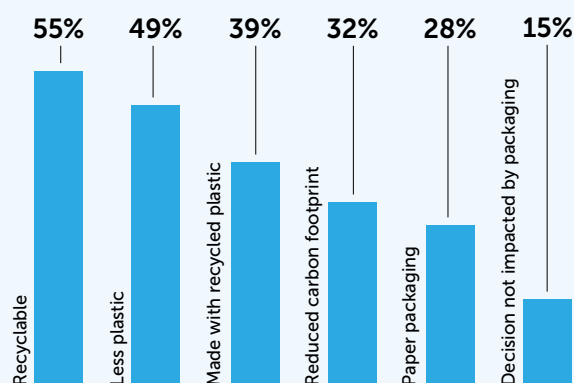
### Collaboration with experts

Some smaller brands are teaming up with experts in sustainability to draw a direct line between packaging choices and a positive environmental impact. The plastic tubs used by UK raw dog food brand Benyfit Natural, for instance, are now made from plastics collected from coastal towns and cities that would otherwise have polluted the environment. The move follows a partnership with the Prevented Ocean Plastic (POP) sustainable initiative that kicked off in 2023.

***Many leading pet brands are already making bold commitments that will see them move ahead of the curve when it comes to compliance.***



### What type of packaging claims positively influence your purchase of pet food?



Source: Amcor, December 2024 (n=1,693)

“Switching to using POP for our raw food tubs is just the first step of many to come,” says Greg Van Praagh, Head of UK & Europe at brand owner RPFC and co-founder of Benyfit. “Our new Benyfit Bites treat range packaging is 100% recyclable, and all our cardboard boxes and sleeves are too. We know we’re not perfect yet, but we plan on getting as close as possible over the next few years.”

At C&D Foods, which co-manufactures for pet food brands across Europe, the company has also invested significant sums in creating recycle-ready packaging solutions for its customers. In 2021 it signed a “multiyear, multi-million euro” deal with ProAmpac to develop innovative sustainable solutions, including a fully recyclable pet food pouch which is now being trialled in several European markets.

### Appeal of recycle-ready packaging

The findings of an Amcor survey that gathered insights from 1,693 shoppers in the UK, France, Germany and Italy in December outline consumer concerns. The survey found that product sustainability influences 76% of pet owners’ purchase decisions. In addition, 69% of respondents agree that the sustainability of

*Some smaller brands are teaming up with experts in sustainability to draw a direct line between packaging choices and a positive environmental impact.*

packaging is an important element of that, and 55% say they're positively influenced by recyclability claims on the pack.

"Many of these environmentally conscious consumers look to a product's packaging to help them differentiate between more sustainable and less sustainable options," Amcor Marketing Communications Project Leader Cassandra Capriati points out. That makes the benefit to early compliance twofold. "Making the switch to recycle-ready packaging now will already appeal to consumers, as seen in the latest research, and also prepare brands for PPWR compliance," she says.

It's why, even in products yet to hit the market, packaging is a key consideration. At halal-certified cat food brand Hurayra Halal Pet Foods, set to go into distribution in the UK from May and with ambitions to enter European markets, the decision to invest in recyclable materials was made to ensure the brand's ethics were in alignment across its supply chain.

"We are committed to sustainability and aligning with the PPWR," says founder and Managing Director Ahtsham Rashid. "We are actively working towards reducing packaging waste by using recyclable, lightweight and eco-friendly materials, integrating post-consumer recycled content, and ensuring our packaging is designed for recyclability. Our goal is to provide high-quality pet food while minimizing environmental impact, and we continue to explore innovative packaging solutions that meet and exceed PPWR standards."

### Going above and beyond

Though PPWR will undoubtedly be burdensome for many leading pet manufacturers, forward-looking brands look increasingly likely to view it as a nudge in the right direction. In the years to come, sustainable packaging is set to be a prerequisite for eco-conscious pet consumers – and those brands that do no more than the legal bare minimum will find themselves left behind. ♦

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Tetra Pak

# Game-changing pet food packaging that consumers will love

Discover how Tetra Recart® meets – and exceeds – pet owners' expectations for the products they purchase.



Consumers have a clear idea of what they want from a pet food package: convenience. Easy to open, pour from and close again without spillage. Storage should be simple, and sustainability is a key factor in their choices. Is there a single carton that meets all these needs and more?

## Introducing: Tetra Recart®

Tetra Recart is an innovative packaging solution designed to address consumer demand while enhancing the pet ownership experience.

A study was conducted among 483 consumers in Italy, France and the UK, inviting them to try out a Tetra Recart package. The feedback was overwhelmingly positive. This type of package not only meets key expectations, but also has new extra benefits for the user.

## Pet owner priorities

Pets can be very unpredictable and their eating habits vary. So Tetra Recart offers

a practical solution for when an entire portion isn't needed. The package can be securely reclosed, keeping the food fresh for the next meal.

This feature resonated with 67% of the consumers in the study, significantly improving their experience compared to alternative packaging.

For 59% of them, the possibility of reclosing the package is even a major factor influencing their purchasing decision. Consumers also appreciate how easy it is to empty the package completely.

Today's consumers are more conscious of sustainability than ever before. Among those surveyed, Tetra Recart was perceived as the most sustainable solution compared to other packaging options.

It received top ratings for ease of disposal and its lower environmental impact, making it attractive to eco-conscious shoppers.

## Shelf appeal

It helps that it looks great on the shelf as well. Tetra Recart stands out in the store, with 62% of consumers stating they would choose it over a traditional can if given the option. It was the most-liked packaging format following the trial period.

Tetra Recart is available in a variety of sizes, allowing brands to offer both small portion packs and larger quantities to meet diverse consumer needs.

With its convenience, sustainability and strong consumer appeal, Tetra Recart offers significant benefits for pet food manufacturers, owners and pets alike. So look no further than Tetra Recart – the future-proof packaging solution. ♦

**Tetra Pak International S.A.**



**Read more about why Tetra Recart is ideal for pet food**



# Sourcing nutrition from the sea – fish, krill and algal omega-3

As pet food makers seek to include DHA in their products to boost functional benefits, there's an increasing need to find sustainable sources of this nutrient.



**Laura Ward**  
Pet Nutritionist

Pet parents want to know how food can elevate their pet's health – and omega-3 fatty acids deliver a multitude of health benefits. Docosahexaenoic acid (DHA) is especially sought after for pet food due to its many and varied effects.

## What is DHA?

DHA is one of the most important essential fatty acids. It is responsible for multiple positive effects, including soothing inflammation, supporting brain and eye health, and aiding skin and coat health. DHA can be derived from fish, krill and algal sources.

## Weighing up sustainability

A diminishing supply of fish and its co-products amplifies the need for sustainable fishing practices, which are vital to protect the delicate balance of marine ecosystems. This combined with increasingly volatile costs is leading formulators to search for alternative options to supply DHA omega-3, so they rely less on fish.

Krill is an alternative, but is similarly limited and therefore sensitive harvesting to ensure marine ecosystem balance is just as important. Algae has the potential to fulfil greater supply volumes.

Produced through fermentation or in photobioreactors, algae has been more costly yet provides greater sustainability advantages and supply stability.

## Variations in yield

Yields of fish oil and component fatty acids are variable, and depend upon diet composition, which differs according to environmental factors. The quantity of fish required to yield a volume of fish oil varies with, and among, species, alongside age, sex and location, as well as with the season and reproductive stage.

The composition of fish oil fatty acids also varies dependent on these factors plus the environmental conditions of the fish, as well as the processing and stabilization of the oil. A 2016 study showed declining EPA and DHA fatty acids in farmed Scottish salmon oil over a 10-year period.

Reduction in fish meal and fish oils as a component of aquaculture feed, due to its increasingly limited supply and finite nature, is thought to be partly responsible. Terrestrial oils, such as those from oilseed crops, are included as a substitute, changing the fatty acid profile of fish produced.

[▶ SEE NEXT PAGE](#)

***Algae cultivation is consistent and unaffected by season, geographical origin or other environmental inputs.***

Here, algal sources offer an advantage. With production through inoculum in photobioreactors or by heterotrophic fermentation, algae cultivation is consistent and unaffected by season, geographical origin or other environmental inputs.

### Dangers of bioaccumulation

As DHA and eicosapentaenoic acid (EPA) bioaccumulate through predatory fish in the food chain, bioaccumulation of less desirable elements also occurs. Heavy metal and other pollutants, such as polychlorinated biphenyls (PCBs) and dichlorodiphenyltrichloroethane (DDT), increase in concentration up the food chain. Large fish species, like tuna, can therefore contain significant quantities of elements such as mercury.

This concern affects recommendations of fish inclusion within the diet, with some experts warning against daily consumption of fish. A 2015 article in the British Journal of Nutrition, however, advised that the benefits of fish consumption outweigh the risks.

As both krill and algae are found at the beginning of the food chain, the bioaccumulation of heavy metals and pollution is far reduced – although a 2025 study concerning the contamination of microplastics into omega-3 supplements found microplastics present in all marine formats, including algae. Algae cultivated outside of the marine environment, however, is not affected by this pollution contamination.

### Minimizing oxidation products

As polyunsaturated fatty acids, omega-3s are readily oxidized. In human nutrition, aldehydes were studied by nutritionists in New Zealand as a product of oxidation, with negative health effects from inflammatory to mutagenic properties. This study, published in 2019, found the aldehydes present in krill oils to be greater than both fish and algal oils, with algal oils showing the least aldehyde content in this trial.

Oxidation is dependent on several factors, not least antioxidant inclusion and the storage and processing of the marine materials through the supply chain. Quality of marine DHA sources should be a key consideration for any supply, to minimize the oxidation products present in nutritional products.

### Nutritional comparisons

The fatty acid profile of each omega-3 source varies, both between each source being investigated and between different species or supply. DHA supplied through fish sources varies from 3-38% depending on species alone. Salmon species have a variation of 3-18% DHA. The DHA content of krill is approximately 6%, while for algae it is around 17%.

Although each source delivers DHA and EPA, the medium to which these fatty acids are bound differs. In fish, the omega-3 fatty acids are bound to triglycerides, whereas in krill omega-3 binds phospholipids. The phospholipid form is claimed to be advantageous over triglycerides, as phospholipids are the lipid form of which the cell membrane is made. Triglycerides must be rebuilt into phospholipids prior to incorporation into the cell membrane and may be degraded or utilized as an energy source first.

### Ensuring future supplies

Looking forwards, studies into DHA marine sources show concern regarding the finite nature of fish and the requirement for environmentally conscious practices and sustainable fishing. DHA is an important nutrient delivering substantial and widespread benefits to health, therefore solutions to maintain its supply are a focus.

Key alternatives to marine oils being studied include bioengineered oilseed crops and the use of marine microbes to produce DHA. Macroalgal hydrolysate in combination with glucose was recently found in a Japanese study to form an economical substrate for marine microbes to produce DHA in laboratory settings.

Stable multigene construct designs have previously been found to be successful in production of over 12% DHA in *Camelina sativa* oilseed crop. Both options show exciting possibilities for the future availability of DHA through sustainable terrestrial sources.

It is clear that the demand for DHA outweighs the supply of fish oil – even when only considering human nutrition. Understanding alternative sources is important to enable the continued use of omega-3 DHA within companion animal nutrition and to access its many health benefits. ♦



## How can palatants enhance the appeal of gently cooked meals?

As pet owners seek healthier, more natural options for their pets, the appeal of home-cooked style meals has surged. But what makes these meals irresistible?



**Yolandi van der Vyver**

*Wet Technical Application Specialist*

*AFB International*

*afbinternational.com*

Over the years, pet nutrition has evolved from feeding table scraps and home-cooked meals to biscuits, kibble, wet pet food and, now, a return to home-cooked style meals. Why, after decades of innovation and refinement in pet food production, has the industry circled back to this approach? The answer lies with the consumer.

Pet owners today are faced with an overwhelming array of options when it comes to pet food, from kibble to raw, freeze-dried and wet diets. The decision-making process can be daunting. With so many choices available, it's challenging to determine which is best, and navigating the many labels and packages often adds to the confusion. This is where gently cooked products come into play.

### Trust and transparency

Gently cooked pet food has seen rapid growth in recent years, and its success can be attributed to a few key factors. First, the straightforward packaging and labeling make it easy for pet owners to understand what they're buying. When opening a package, the sight and smell of the food enhance the trustworthiness of the product. Additionally, the inclusion of vegetables and herbs appeals to pet owners' desire to provide the healthiest options for their pets.

### Building the right customer experience

While gently cooked meals tap into the desire for wholesome, home-cooked food, they come with some challenges from a palatability perspective.

The cooking methods used in this category – such as steaming, sous-vide or low-temperature cooking – result in different flavor profiles and levels of palatability. Also, the appearance of the food, including its color and texture, can be influenced by the cooking method.

To enhance palatability, the right palatants are essential. These must be adjusted to the cooking technique to help achieve the ideal flavor profile and improve the product's attractiveness.

The goal is to replicate the experience of home-cooked meals, where the smell and appearance of the food are just as important as the taste. When pets enjoy every bite, it not only makes them happy, but also reinforces the trust pet owners have in the product.

### Expert collaboration

AFB International specializes in collaborating with manufacturers to find the most suitable palatants for gently cooked pet food products. The company's team of application technologists is dedicated to helping producers select the best flavor solutions, and offers training and insights tailored to each manufacturer's needs. ♦





# What's in the (pre)mix?

**Ongoing considerations for producing a good premix include optimizing the shelf life of vitamins and improving the consistency of particle size.**



**Alexandra Wesker**

*Contributor*

*PETS International*

If you make a cake from a mix that states 'just add water, eggs and butter', then that mix can be seen as a kind of premix: a multi-ingredient addition consisting of more than just flour. Traditional pet food premix usually consists of more than 15 materials including vitamins, minerals and trace elements. Choosing to add different forms of one material such as both inorganic and organic trace elements can increase the number of materials to 30 or more.

## Nutritional essentials

Premixes are typically added to 'complete' rather than 'complementary' pet food as complete foods must meet all the daily nutritional requirements of cats and dogs, including vitamins and minerals.

The main pet food ingredients typically cover the major nutrients, including protein and fat. These main ingredients also contribute minor nutritional elements that are then considered in formulating the premix. For example, liver-containing pet food may need lower vitamin A in the premix, fish inclusion may need removal of selenium, and insect-based formulations may see added taurine for cats.

## Vitamin degradation

To achieve a particular level of a vitamin in the finished product, it is not sufficient to formulate to that level. Vitamins, both natural and synthetic, break down. The main contributing factors to degradation are physical treatment and chemical reactions over time. Degradation of natural vitamins is typically more rapid and less predictable than for synthetic vitamins.

Extrusion and retort degrade vitamins: from less than 5% for the more stable forms to well over 50% for the least stable vitamins. Process matters; thiamine (B1), for example, is degraded more by retort than extrusion.

In their original packaging, manufactured synthetic vitamins have great stability. In a mix, the materials react with each other, reducing stability. Choline chloride is the main cause of degradation due to its hygroscopic nature. Inorganic minerals and trace elements can be very reactive and greatly degrade vitamins.

Vitamins continue to degrade in the finished product after manufacturing due to exposure to oxygen, moisture and other components in the food. This is one reason why it is hard to guarantee a longer shelf life for pet food, because degradation may have reduced vitamin levels to below minimum nutritional requirements.

*Vitamins continue to degrade in the finished product after manufacturing due to exposure to oxygen, moisture and other components in the food.*

### Ensuring consistency throughout

Aside from the nutritional considerations, manufacturers are concerned with the physical characteristics of a premix. One batch of premix may be divided across individual small packages that all need to deliver the expected nutritional profile. The ingredients therefore need to mix well before being packed off.

In the pet food factory, the bags may not be used in one go, but scoops may be weighed into the pet food. The nutrition at the top of the bag must therefore be similar to that at the bottom of the bag. Homogeneity of particle size plays a big role here.

For example, shaking a jar that contains both sugar cubes and loose sugar will bring the cubes (the larger particles) to the top. The same happens while handling bags of premix. This effect is particularly pronounced if the premix is transported in large tote bags.

### Quick wins and opportunities

Nutritional wins can be made by preventing unnecessary degradation. Try to avoid adding the premix before the hammer mill. The heat and grind of the mill greatly reduce vitamin levels and waste value.

Removing choline chloride from the premix and dosing that separately helps maintain vitamin stability. Separating the premix into vitamins and minerals further helps to maintain this stability.

This changes the addition in the plant from 1 premix to 3 additions (vitamins, minerals and choline chloride) and requires recalculation to prevent overdosing or omitting nutrition. Ask your premix manufacturer for support.

Alongside essential nutrition, premixes also allow for additions of functional ingredients at levels too small to dose in the pet food directly. This creates opportunities for adding globulins, lactoferrin or eggshell membrane. Slightly larger additions of chondroitin, glucosamine and inulin can be included in the premix and reduce the number of manual additions in the pet food plant. ♦



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# How AI can reduce waste in pet food production

AI-driven solutions can help pet food manufacturers cut waste, optimize processes and enhance sustainability by uncovering hidden inefficiencies.



**Raven Brackx**  
Product Manager  
BESTMIX Software  
[bestmix.com](https://bestmix.com)

Waste management might not seem exciting, but it's vital to pet food production. Waste includes not just spoiled ingredients or defective products, but anything that doesn't add value or is unnecessary, according to Lean principles. In today's sustainability-focused era, reducing waste conserves raw materials, energy and water.

## AI's role in revealing hidden patterns

Artificial intelligence (AI) excels at uncovering hidden patterns. For example, a pet adoption center used AI to analyze factors influencing adoption rates. While many thought 'cuteness' was the most important factor, AI revealed that the number and quality of photos had a far greater impact. Using this insight, the center improved strategies, helping animals find homes more efficiently. This highlights how AI reveals missed opportunities.

## Improving the extrusion process with AI

One example of where AI can help save costs is the extrusion process. Operating an extruder requires a certain 'fingerspitzengefühl' (intuitive instinct) as the process is too complex to be managed by simple 'if-this-then-that' rules. AI can accurately predict ideal extruder settings based on various inputs, such as desired moisture content, production line characteristics and input mixture formulation.

This leads to a more stable extrusion process, significantly reducing startup waste and rework. For example, reducing startup time by 10% or cutting downtime from blocked extruders by 30% can have a significant impact on the bottom line.

## High-quality data

However, implementing AI successfully requires high-quality, relevant data. The principle of 'garbage in, garbage out' holds true; AI models are only as good as the data used to train them. Ensuring accurate and complete data is crucial to achieving meaningful results and avoiding costly mistakes.

## The future of AI in pet food production

The future of AI in pet food production is about more than just minimizing waste, it's about transforming the industry. Successful AI implementation requires a strategic vision, high-quality data and skilled personnel.

AI won't replace jobs, but those who master it will have a competitive edge. Companies that invest in AI and foster innovation will redefine efficiency, quality and profitability. The choice is clear: adapt or risk being left behind. The pet food industry is on the brink of a new era, and those who embrace AI will lead the way. ♦



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at [bestmix.com](https://bestmix.com)



# Milestone on the road to insect-enriched pet food

As the European Commission officially adopts a set of guidelines on hygiene practices, we look at what that means for producers of insect-based ingredients for use in pet nutrition.



**Christophe Derrien**  
*Secretary General*  
IPIFF

The International Platform of Insects for Food and Feed (IPIFF) is celebrating a milestone now that the European Commission (EC) has officially recognized the IPIFF Good Hygiene Practices for European Union Producers of Insects as Food and Feed guidance document.

## Benefits of insects for pet food

By helping producers navigate regulatory requirements, the document offers a robust framework for incorporating insect-based ingredients into food and feed products – including pet food – as a way of meeting the growing demand for sustainable and nutritious products.

As highlighted in the document, insect proteins have significant environmental and nutritional advantages in human food, animal feed and pet food production. Insects such as black soldier fly larvae and yellow mealworms are nutrient-rich, containing high levels of essential amino acids, healthy fats and micronutrients, which make them ideal for pet diets. They also offer high digestibility rates of up to 90%.

Insect-based processed animal proteins (PAPs) are particularly well-suited for use in pet food, meeting not only the nutritional needs of pets but also aligning with the EU's sustainability objectives. The European Green Deal's goals to reduce emissions and promote circular

agricultural systems make insect-based solutions an increasingly attractive option for producers, with the industry registering a compound annual growth rate (CAGR) of over 25%.

## Consumer preferences drive growth

The European insect pet food market has seen a significant upsurge in recent years. IPIFF attributes this to several factors, notably the nutritional profile of insect-enriched products, their sustainability credentials and their natural origin. Pet owners are increasingly looking for alternatives that reduce their environmental footprint while ensuring optimal health for their pets. This trend creates significant opportunities for producers to incorporate insect proteins as a premium, eco-friendly ingredient in their products.

In view of this growth, IPIFF identified the need for a guidance document that informs producers about how to adhere to EU food and feed production standards and requirements.

## A roadmap for pet food producers

The IPIFF guidance document provides detailed best practices for producing, processing and using insect proteins for food and feed, including pet food. This includes the critical role of robust food and feed safety management systems in the production of insect-based proteins. The document also contains practical advice for ensuring hygiene, cleanliness, safety, traceability and effective controls across the entire production chain to prevent contamination.

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***The guidelines not only ensure compliance with EU rules, but also support pet food producers in delivering high-quality, innovative products.***

The document focuses on compliance with key EU requirements, including regulations such as the Animal ByProducts Regulation (Regulation (EC) No 1069/2009), the General Food Law, and Regulation (EC) No 1831/2003 on feed hygiene, which mandates the implementation of Hazard Analysis and Critical Control Points (HACCP) principles.

This systematic approach helps producers identify, evaluate and control potential hazards at all stages of production. By following these principles, insect producers can develop ingredients and products that can safeguard the health of pets, ensure consumer confidence and meet stringent EU regulatory standards.

### **Compliant processing methods**

Processing techniques are essential to ensure the safety, quality and nutritional value of insect-derived ingredients by stabilizing the insect raw material, improving its digestibility and enhancing its nutritional profile. Therefore, the IPIFF guidance document provides detailed insights into the processing methods used for insects intended for consumption.

Common processing methods include drying, which reduces moisture content to prevent microbial growth, and grinding, which transforms whole insects into powders or meals suitable for incorporation into pet food formulations. Additionally, fat extraction is often applied to separate oils, further refining the ingredient's nutritional composition. The guidance document emphasizes that these processes must be conducted in compliance with the EU's hygiene standards to guarantee safety across the production chain.

### **Post-production processes**

For ease of use, the IPIFF guidance document also provides a detailed breakdown of the storage, packaging, labeling and transport operations requirements for producers of insect-enriched food, including those importing from outside the EU. The document emphasizes the importance of

transparency in labeling and communication to end customers. This complements the IPIFF Guide on Good Labelling Practices for Insect-based Feed Materials published on 27 June last year.

By upholding good labeling practices and appropriately communicating the benefits of insect-based ingredients, pet food producers can build trust and loyalty among environmentally conscious consumers, as well as empowering them to make informed choices about the pet food they buy.

### **Building confidence through clarity**

The EC's recognition of the IPIFF guidance document is a landmark moment for the insect industry, as it provides much-needed regulatory clarity. By following the outlined standards and methods, producers of insect-based ingredients and pet food can now innovate confidently in this space.

The guidelines not only ensure compliance with EU rules, but also support pet food producers in delivering high-quality, innovative products. As a result, consumers and their pets will be able to benefit from the nutritional and sustainability-related advantages of insect-based proteins.

### **Ensuring a future for insect proteins**

As the pet food industry continues to evolve, the recognition of IPIFF's guidance document underscores the growing importance of insect-based proteins in driving sustainability and innovation. By adhering to the best practices outlined in the document, producers can position themselves at the forefront of this rapidly growing market, offering high-quality, sustainable options for pet owners across Europe. ♦



# The effects of collagen hydrolysate in dogs with osteoarthritis

A research study explores whether collagen hydrolysates can improve joint health and reduce pain in dogs with osteoarthritis.



**Niels Blees, DVM, MSc**

*Researcher PhD candidate, Faculty of Veterinary Medicine, Utrecht University  
sonac.biz*

Collagen hydrolysates have gained attention as a potential nutritional supplement for joint health, particularly in the context of osteoarthritis (OA) in dogs. Since 2021, a PhD study has been underway to investigate the effects of Sonac's Hydro-P Premium (HPP) in dogs with OA. The aim is to determine if the benefits seen in humans could apply to canines as well.

## Collagen's role in joint health

Collagen, a key structural component of cartilage, is found in skin, bones and joints. When heated, it transforms into gelatin, a substance historically known for alleviating joint pain. Collagen hydrolysates are produced by breaking down the collagen into smaller peptides, which are more easily absorbed into the bloodstream when included in pet food.

In animal studies, these peptides have been shown to accumulate in the skin, cartilage and bones. However, similar studies in humans and dogs are limited, and further research is needed to confirm the full scope of benefits for dogs.

## Study design and methodology

To assess the bioavailability in dogs, beagles were fed varying dosages of HPP. This experiment was key

in understanding how the body absorbs collagen and helped establish dosing guidelines for dogs.

The study is now advancing to explore biomolecular mechanisms, aiming to understand how collagen hydrolysates influence inflammation and cartilage regeneration at a molecular level.

## Collagen hydrolysate helps dogs with OA

For real-world application, two kibble formulations were created: one with collagen hydrolysate and one without. Dogs with radiographically confirmed OA were monitored throughout the study, observing the progression of their symptoms.

At the end of the study, the research team will analyze whether collagen hydrolysate effectively reduces pain and slows joint deterioration in dogs. If proven effective, collagen could become a valuable addition to current osteoarthritis treatments, helping dogs move more comfortably and enjoy a better quality of life.

## Empowering pet food manufacturers

The research into collagen hydrolysate's impact on canine joint health utilized Hydro-P Premium (HPP), a high-quality ingredient from Sonac, by Darling Ingredients. The brand's commitment to research and product development empowers pet food manufacturers to create innovative, effective products, helping pets live longer, healthier and more active lives. ♦





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# Eyes and ears open UK study highlights health issues of English Cocker Spaniels

Research from the Royal Veterinary College reports on disorder predisposition and protection in this popular breed of dog.



**Karolina Engdahl**

*Epidemiologist, Swedish University of  
Agricultural Sciences (SLU)*



**Dan O'Neill**

*Associate Professor in Companion Animal  
Epidemiology, Royal Veterinary College,  
University of London*

VetCompass™ (the Veterinary Companion Animal Surveillance System) is an epidemiological research program at the Royal Veterinary College (RVC), which investigates anonymized clinical records from veterinary practices to generate evidence to support improved animal welfare.

## The benefits of the research

A recent research study led by the program explored the health records of English Cocker Spaniel (ECS) dogs under primary veterinary care in the UK. The program's results can aid vets, breeders and dog owners to better monitor dog health and promote earlier diagnosis.

The ECS is one of the most popular breeds in the UK. Although the breed is not considered to be one with major health issues, the UK's Kennel Club does recommend that breeders should screen ECS for several health conditions including eye disorders and hip dysplasia, although it is unclear how important these conditions really are to the health of these dogs.

A previous RVC VetCompass paper published in 2023 reported the most common disorders of the ECS, which included periodontal disease (inflammation of the gums and tissue around the teeth), otitis externa (ear inflammation) and obesity.

## Novel findings

Despite this information on disease frequency in the breed, there has been little information until now on which disorders the ECS is either predisposed to or protected from compared to other dogs.

Combining information regarding the most common disorders within a breed and also on disorder predisposition/protection helps to identify those disorders with the highest health-related welfare impact for that breed, and can help owners and breeding organizations to establish key health priorities.

## Pinpointing risk

In this latest study, disease occurrence was compared between random samples of 2,510 English Cocker Spaniels and 7,813 dogs other than ECS, from a total population of 336,865 dogs under primary veterinary care during 2016.

The overall disease burden in ECS was higher than in the group of other dogs, with the ECS showing 1.12 times higher risk of being diagnosed with at least one disorder during the study period.



The ECS showed increased risk (i.e. predisposition) for 21 (48.8%) of the 43 most common disorders across both groups of dogs. The conditions with the highest risk in ECS were ear discharge (x14.66 risk), dry eye (keratoconjunctivitis sicca) (x7.64) and musculoskeletal pain (x7.06).

Several other eye conditions featured among the high-risk disorders (ocular discharge x2.03, cataract x1.90 and conjunctivitis x1.49), suggesting that eye disorders are an important contributor to the total disease burden in the ECS. The ECS also had an increased risk of other ear-related disorders (ear disorder x3.59, otitis externa x1.40).

Allergic skin disease is often reported as the most common cause of ear-related problems in dogs, but the main trigger in the ECS might be different because decreased risk was identified for allergic skin disorders and related conditions (allergy x0.14, atopic dermatitis x0.14, pododermatitis/inflammation of the paw x0.35, alopecia/hair loss x0.35, pruritus x0.65). The ECS had a decreased risk (i.e. protection) of 11 (25.6%) of the 43 most common disorders in

both groups. Disorders with a low risk in ECS included osteoarthritis (x0.37) and retained deciduous teeth (x0.35).

### Potential impact

Overall, the study suggested that the ECS is especially predisposed to ear and eye disorders. These predispositions may be related to the pendulous ears and loose skin on the face that define the breed. Conversely, the ECS appears protected to several skin-related disorders such as allergy, atopic dermatitis, alopecia and pododermatitis.

These findings can help owners to select the healthiest dog for themselves when they are first deciding on which type of dog to acquire. For owners who already have an ECS, this information can encourage them to pay special attention to ear and eye health in their dog.

These results can also aid breeders and veterinarians to better monitor health in ECS, promote earlier diagnosis with improved prognosis and can help breeding organizations establish key priorities for the health-based reforms of the ECS. ♦

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**HALL 29, STAND I01 - L02**

# Nutritional management of pancreatitis in cats and dogs

The latest research into the dietary treatment of pancreatitis focuses on regulating fat intake and providing omega-3 supplementation.



**Diana Brozić**  
Assistant Professor  
University of Zagreb

Nutrition is an important part of the treatment in cases of pancreatitis and should, therefore, be adjusted accordingly. Effective dietary strategies to support dogs and cats with pancreatitis focus on nutrient balance, digestibility and long-term management for improved health outcomes.

## What is pancreatitis?

Inflammation of the pancreatic tissue, better known as pancreatitis, can often be seen in both cats and dogs. Pancreatitis can manifest as an acute, chronic or subclinical illness, and can present with various clinical signs. The frequency of occurrence is estimated at 1-2% in veterinary practice, but due to the severity of clinical signs and its life-threatening nature, it is a well-known concern among owners and veterinarians.

In addition to hypertriglyceridemia, dietary indiscretion is thought to be a common risk factor for its occurrence in dogs, but interestingly, the same does not apply to cats. In cats, the causes of pancreatitis are still a mystery. It is often seen as part of a pathology called triaditis, in which inflammation of the small intestinal system, liver tissue and pancreas occurs simultaneously.

## Early nutritional care

In acute pancreatitis, appetite is severely impaired in both cats and dogs, so enteral nutrition alongside

intensive care treatment is indicated in cases of anorexia or inadequate calorie intake. It is important to combat negative energy balance by meeting the patient's energy requirements to avoid adverse effects of increased protein turnover, especially in cats, which are at risk of hepatic lipidosis if anorexia persists.

The feeding route of choice is often via nasoesophageal feeding tubes, using polymeric liquid diets. Enteral nutrition prevents atrophy of the enterocytes and thus reduces the risk of bacterial translocation or sepsis, and is therefore considered an essential part of the treatment.

In dogs, it is important to reduce the fat content of the diet and, at the same time, increase the number of meals, which can be up to 7 feedings per day in intensive care. Dietary fat is the most important nutrient to adjust as a high-fat diet in dogs appears to trigger and exacerbate pancreatitis.

## Dietary management at home

Once the pet patient is stable and has regained their appetite, they can be discharged for home care. There, too, the owners should follow the principle of a low-fat diet and a higher frequency of feeding (approximately 4 meals per day). Easily digestible gastrointestinal diets with reduced fat content (approximately 20 g/Mcal) are recommended.

Dietary protein intake should be sufficient to support recovery, while excessive protein intake should be avoided as dietary protein and amino acids stimulate

***Dietary fat is the most important nutrient to adjust as a high-fat diet in dogs appears to trigger and exacerbate pancreatitis.***

pancreatic secretory activity. Diets rich in soluble fiber are also not recommended in cases of vomiting or regurgitation because they can cause delayed gastric emptying.

Interestingly, fat reduction is not considered as important in cats due to the very different pathophysiology of pancreatitis. In this case, it is better to focus on providing an easily digestible and palatable diet that ensures recovery and provides adequate caloric intake.

### Long-term management

Obesity in dogs was shown in a 2024 paper published in the Journal of the American Veterinary Medical Association to be associated with acute pancreatitis due to the inflammatory effects of adipose tissue. Therefore, it is crucial to assess and adjust the patient's body composition accordingly and, in the case of obesity, to implement a careful weight-loss protocol.

Pancreatitis is often associated with hypertriglyceridemia. Pancreatic lipases hydrolyze triglycerides into free fatty acids, which can be toxic to pancreatic acinar cells if produced in excess. Hypertriglyceridemia can be managed nutritionally by reducing fat levels in the diet and increasing the intake of omega-3 fatty acids, as demonstrated by a 2021 study published in peer-reviewed open access journal PLOS One that showed these factors decreased both plasma cholesterol and triglyceride concentrations.

Dietary management of pancreatitis continues to be a pinnacle of its treatment. Many dogs and cats with pancreatitis can be transitioned back to a highly digestible commercial maintenance diet in the case of a one-time acute pancreatitis occurrence that is completely resolved. The long-term use of a low-fat diet is prioritized in dogs with recurrent episodes of acute pancreatitis, or in case of chronic pancreatitis. With a few interventions and adjustments in our pet's daily nutrition plan, we can ensure a good quality of life even in cases of chronic disease. ♦



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The Seitz logo is a red rounded rectangle with the word "seitz" in white lowercase letters.

# Premium recipes for market success

**The demand for the quality of pet food products in the private label sector is growing. The Seitz Group from Langwedel supplies premium recipes for market success in this segment.**

The company has been producing high-quality wet food for dogs and cats for more than 40 years. Species-appropriate recipes, which are developed in close co-operation with vets and nutritional experts in accordance with FEDIAF standards, are the basis for the premium quality of the wet food specialist. The ingredients? Fresh meat and offal, alternative protein sources such as pulses, potatoes or insects, vitamin-rich fruit and vegetables, valuable herbs and high-quality oils.

Seitz attaches great importance to regionality. The raw materials are mainly sourced from local suppliers. Many years of experience, innovative strength and close co-operation with trade and industry guarantee consistently high quality of the species-appropriate pet food.

Seitz sees itself as a full-service partner for its customers - with a range of services that goes far beyond development and production. The entire value chain is professionally covered: from the procurement of raw materials to production planning and on-time distribution logistics.

The IFS-certified company offers a selection of around 300 recipes for companies that want to conquer the market with customised products. These include grain-free wet food, vegetarian and vegan complete foods with innovative

plant-based protein sources as well as 'Gently Cooked' products, which are particularly gently processed and chilled to meet the growing demand for freshness among pet owners.

The product range also includes mealworm-based insect protein as a complete feed. The products are packaged as tins (200, 400 or 800 grams) or sausages (40 to 1,800 grams) to meet different market requirements. Even the smallest sizes, such as packaging in 100 gram cans, are possible.

Industry and retail partners benefit from professional, uncomplicated co-operation. Whether product development, production or logistics - Seitz stands by its customers as a reliable expert for premium wet food.



*Seitz headquarters in Langwedel near Bremen: From production to logistics, the service covers the entire value chain.*



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**Seitz Heimtiernahrung GmbH & Co. KG**  
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Germany

Tel. +49 (0) 4232-3091  
[D.schneider@seitz-tiernahrung.de](mailto:D.schneider@seitz-tiernahrung.de)





## German online market Is there room for growth for all?

**Consumers already experience the benefits of finding their information and products digitally. Now it's the turn of retailers to make the best use of the channel.**



**Frank Düssler**

*German E-Commerce and Distance  
Selling Association (bevh)*

The trend curve of online retail is 'smiling' again. After 8 consecutive quarters of declining online consumption in Germany, the market is finally turning around. Hopes are particularly high in the pet supplies sector. Can the industry once again prove that it can grow faster than the overall market?

### Long way back to normality

Germany, Europe's largest economy, is now in its fourth year of a severe consumption crisis. First came the COVID-19 pandemic, followed by an inflation shock and then 2 years of recession. Consumer confidence? Completely shattered. For a long time, e-commerce

was no exception. By last year, the industry's total revenues had fallen back to 2019 levels and have stagnated since then.

The only exception was online sales of fast-moving consumer goods (FMCG), which include groceries, drugstore items and pet supplies. Over the past 3 years, this segment has performed significantly better than the overall market, managing to maintain steady growth rates. The question, however, is whether that is enough.

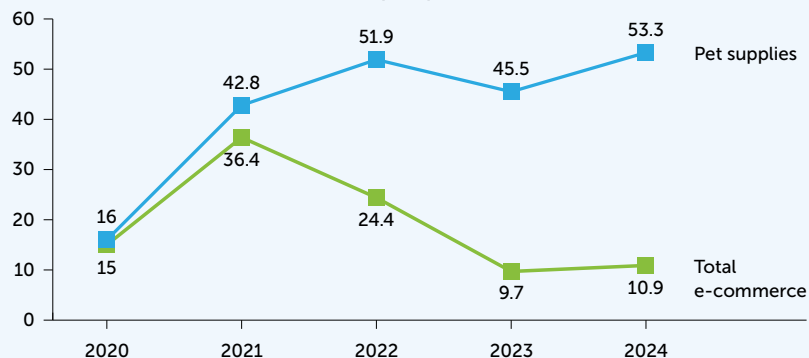
### Reaping what was sown

For pet supply retailers, 2025 will be a decisive year in many ways. To understand why, we need to take a quick look back. The fact that the pet supplies sector outperformed the broader market during the crisis had multiple causes.

[▶ SEE NEXT PAGE](#)



## German e-commerce revenue growth (in %)



Source: bevh

While most online retailers focused on cost-cutting and restructuring business channels, many pet care specialists took the opposite approach. They invested counter-cyclically, aiming to expand their online market share massively once consumer sentiment improved. Additionally, the market saw broader diversification.

### Meeting growth expectations

Alongside online pure players, manufacturers and traditional retail chains increasingly launched their own e-commerce platforms, expanding online offerings for consumers. Now, many of these companies face a critical question: can they meet the high growth expectations and withstand the ongoing consumption crisis quickly enough? The primary goal for many is to scale their sales channels as quickly as possible while ensuring profitability.

Looking at the past few quarters, this strategy seems to be paying off. The German online pet supply market reached a new record volume of €1.9 billion (\$2B) for the full year 2024 – a modest but important 5.4% year-on-year increase. Today, 1 in 4 euros spent on pets in Germany is spent online. Accessories and toys account for 30% of revenue, while the bulk (70%) comes from pet food sales.

### More discerning pet owners

A key factor supporting the growth of online pet supplies is a significant shift in pet owner buying behavior. Germany has the highest density of supermarkets and drugstores in Europe, so the

nearest place to buy pet food is usually just minutes away. For years, this meant that German consumers had little incentive to purchase pet supplies online. Most of these purchases were simply part of their routine shopping trips to bricks-and-mortar stores.

However, traditional shopping habits are now changing, partly because mainstream supermarkets have failed to keep up with the trends shaping the pet supply industry. One major trend is premiumization, with many customers preferring to buy pet products from specialized retailers rather than adding them to their regular grocery shopping.

Unlike supermarkets, online retailers offer a variety of additional services, such as pet health consultations and specialized food for pets with specific dietary needs. From insect-based protein to gourmet dog popcorn, the wide assortment meets the expectations of increasingly discerning pet owners who are more conscious of their pets' individual needs.

### Making the most of social media

Another missed opportunity for supermarkets is social media. The connection is obvious: few customer groups are as active on social platforms as pet owners.

***Today, 1 in 4 euros spent on pets in Germany is spent online. Accessories and toys account for 30% of revenue, while the bulk (70%) comes from pet food sales.***



People love sharing stories about their furry family members online. Yet, social media is almost exclusively leveraged as a sales channel by online retailers, not by traditional supermarket chains.

Examples like these illustrate that e-commerce has done more than just move the pet supply business online. The digital marketplace has become attractive to consumers because it provides added value and allows retailers to interact with their customers in new ways.

This does not mean that bricks-and-mortar stores should be written off – quite the opposite. When pet owners prefer to shop in-store, they are increasingly bypassing supermarkets in favor of specialized, large-format pet stores that combine the advantages of both online and offline shopping in an omnichannel approach.

This hybrid model, which integrates digital convenience with in-person expertise, could be the key to long-term success in the evolving pet supply industry. ♦

### REWE to open ZooRoyal locations from 2026

After testing 4 locations in Hamburg, the second-largest German supermarket chain is gearing up for a nationwide roll-out of its ZooRoyal store concept, bringing physical pet retail to urban locations across Germany, starting in 2026.

COO Peter Maly says that the online pet player is “already a fixture” in the pet trade and that this is the next step in its business strategy. The supermarket chain aims to open a “high double-digit” number of ZooRoyal stores while focusing on sustainable growth.

The new offline shops will hold around 15,000 items and offer services including grooming and a snack bar. The brand will also continue to provide online services. While specific financial results were not disclosed, REWE says the ZooRoyal stores exceeded performance expectations.



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# ESSENTIAL OILS

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# The expanding market for essential oils in odor control

Essential oils go beyond aromatherapy – they offer a natural, effective way to control odors in cat litter. Discover their role in creating fresher, longer-lasting litter solutions.



**José Barco**

Chief Sales & Marketing Officer, Pet Care  
Sanicat  
[sanicat.com](http://sanicat.com)

The essential oils market has seen significant growth in recent years. Thanks to their natural origins and unique properties, essential oils have attracted widespread consumer interest, driving demand across industries.

According to market research firm Mordor Intelligence, the demand for essential oils in Europe is expected to continue growing, reaching a value of €2,306 million (\$2,466M) by 2029. This represents a compound annual growth rate (CAGR) of over 5%.

On a global scale, the market analysis company Fact.MR projects that the industry will reach a value of €56,241 million (\$60,135M) within the next 10 years, reflecting a CAGR of 9%. Several factors contribute to this expansion, including increasing awareness of the versatility of essential oils in various applications.

## Beyond cosmetics and healthcare

While essential oils are widely recognized for their use in cosmetics and healthcare, their potential extends well beyond these industries. With their powerful properties, essential oils offer innovative solutions in numerous markets, including home care and pet care. Their natural ability to neutralize odors and provide a fresh environment makes them an excellent alternative to synthetic fragrances and chemical-based products.

## Harnessing essential oils for odor control

Reinforcing its commitment to quality, innovation and sustainability, Sanicat embraces essential oils with its new Essential Oils litter range. This provides up to 60 days of odor control, utilizing essential oils from plants and herbs.

This clumping litter eliminates bad smells through adsorption, absorption and neutralization processes. The essential oil droplets capture and neutralize odor molecules, ensuring a fresher environment. Made from natural minerals, the litter forms firm, easy-to-clean clumps that release fragrance each time they are moistened. These clumps can be scooped out individually, keeping the litter box clean without the need for frequent full replacements.

The Essential Oils range features 6 varieties. They all incorporate essential oils, and 4 of them are also scented with fragrances derived from essential oils, including argan oil, white jasmine, cedar and eucalyptus, and orange floral. The remaining 2 options remain unscented, catering to those who prefer a neutral experience.

Sanicat Essential Oils will be sold exclusively through specialized channels in a 10 kg paper bag, aligning with the brand's eco-friendly production and sustainability commitment. ♦

**Zoomark: Hall 30, Booth C63-C67**





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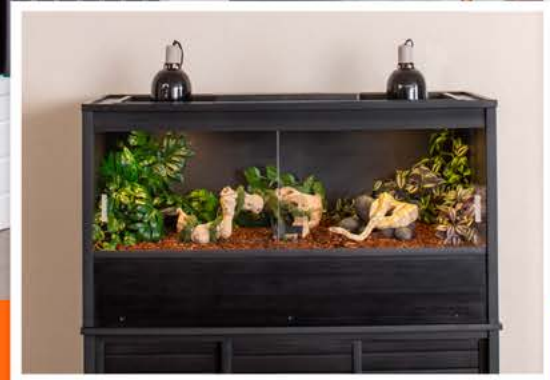
#### BACKGROUND

The company is headquartered in the San Francisco Bay Area in the US. Their factory is in Shantou, in the Guangdong province, on the eastern coast of China. It's a vertically integrated company that covers the complete production process: from product ideation to manufacturing, through to sales.

New Age Pet has distribution channels worldwide, with customers in Japan, Australia, New Zealand, the UK, Europe, Canada, Mexico, Costa Rica and the US.

#### PRODUCTS AND MATERIALS USED

The company started with a simple goal: to create durable, functional and ecofriendly pet products that complement consumers' home décor. To be able to live up to this aspiration, they developed a proprietary composite blend of new and recycled polymers, and reclaimed wood fiber byproducts. This composite blend combines the benefits of wood and plastic into one material: ECOFLEX®. Different than any other material available on the market, ECOFLEX is durable, longlasting and non-toxic. It is also resistant to rot, mold and insects. It doesn't expand and contract due to fluctuations



in temperature or humidity, as do many similar products.

ECOFLEX products are designed to be especially quick and easy to assemble, with most products having an assembly time of only 20-30 minutes. The material is paintable, which means pet parents can paint products to their heart's content to match their style and décor.

In the knowledge that their products are highly durable, New Age Pet offers an unrivaled warranty on all its ECOFLEX products.

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## Innovation in litter and housebreaking products sparks consumer interest

It may be the less glamorous side of pet ownership, but with a growing population of companion animals worldwide, data on sales in the pet hygiene segment on Amazon shows this is an increasingly important part of the market.



**Emma Penrod**  
*Contributor*  
*PETS International*

Overall unit sales of cat litter and related accessories rose by 21% to \$1.5 billion in 2024, while dog housebreaking and cleaning product unit sales grew by 17.8% to \$727 million, according to Amazon US data compiled by Similarweb.

### US market relatively stable

Within major product categories like cat litter, the popularity of long-dominant brands remains relatively stable, with few shifts emerging in last year's Amazon sales data. But the numbers also show that some upstart brands have made major moves in the past year, particularly with automated cleaning items and products that include other innovative or aesthetic features.

### Bestselling cat litter brands

Cat litter is one of those non-negotiable purchases for households with felines, and the 3 bestselling brands on Amazon US in 2024 were Fresh Step, Arm & Hammer and Dr. Elsey's. These also dominate the overall cat cleaning and housebreaking category on Amazon, likely due to the need for frequent, repeated purchases.

Together, these 3 brands achieved \$295 million in cat litter sales on Amazon last year. Whichever brand the pet owners prefer, they tend to stick with it – none of the 3 dominant brands have seen their market share change by more than 3% in the past year.

Fresh Step represents more than a quarter of all the cat litter sales on Amazon, taking home \$143 million, while Arm & Hammer claimed 14% of unit sales at \$88 million, and Dr. Elsey's 12% at \$52 million.

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### New kids on the block

A handful of upstart products did see their sales increase significantly in 2024. Some brands that advertise superior odor control technologies, including Sprinkle & Sweep and All-Absorb, saw their total sales increase astronomically last year, reaching revenues of \$2.9 million and \$1.3 million respectively.

The environmentally focused Sustainably Yours cat litter, meanwhile, tripled its sales, reaching \$3.5 million in 2024.

### Top 3 cat litter boxes

Whereas consumers show a clear preference for a handful of dominant litter brands, sales of litter boxes and related accessories reveal different patterns. Innovative brands offering new designs and automation have eroded sales from more established back-to-basics brands over the past year.

Van Ness Pets, which offers a line of basic cat litter pans and boxes, claims just under 14.5% of all litter boxes sold on Amazon – with a sales value of \$12.2 million. Its share of unit sales did, however, drop by more than 8% in 2024.

***The more limited range of products on the market has also allowed Amazon's own brand, Amazon Basics, to dominate the dog housebreaking category.***

Category runner-up Iris, which offers a wider variety of litter box shapes and sizes – including enclosed top-entry litter boxes intended to reduce spillage – saw its market share in units grow by nearly 9%. It actually outearned Van Ness, with a total 2024 revenue of \$16.3 million, and claimed more than 11% of all litter box sales on Amazon.

Petmate's line of simpler litter boxes offered in a wide assortment of sizes and styles, rounds out the category top 3, at 7.7% of units sold, bringing in \$8.7 million. Its share of the market dropped very slightly in 2024, both in units and revenue.



### Stainless steel and self-cleaning

Outside the top 3, stainless steel litter boxes appear to be having a moment, with unit sales of Suzzipaws' stainless steel boxes up nearly 900% to claim 2.14% of total litter box sales and \$12.6 million in revenue. WoofiGo's stainless steel litter boxes were up by more than 1,000% in units sold, reaching \$7.5 million in revenue, and PWTAA climbed 1,400% in unit sales to \$2.2 million.

Manufacturers of self-cleaning litter boxes also experienced increased sales. Ducksky saw its unit sales grow by more than 5,000%, reaching \$326,000 in revenue and making it the fastest growing litter box brand of 2024. PetSafe, the top-selling automatic litter box brand, and the 6th largest litter box brand overall, sold nearly 19% more units in 2024, at a total revenue of \$29 million. It currently makes 2.6% of all litter boxes sold on Amazon.

### Box liners and enclosures

Self-cleaning litter box manufacturers have seen gains in the sale of litter box accessories as well. Jonny Cat's line of standard litter box liners dominates liner sales, with the brand representing \$4.6 million in revenue and 26% of all liner unit sales on Amazon.

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Some of the fastest growing liner brands – Teleglo, Amogogopet, Anwa and Bcharya – focus only on liners for self-cleaning litter systems. All 4 manufacturers saw sales skyrocket in the past year, bringing in \$2.2 million in sales revenue between them.

Consumers also show growing interest in more aesthetically pleasing litter boxes, with unit sales of Lifewit's litter box enclosures – which incorporate cat litter boxes into specialized shelving units or artificial plant containers – up by more than 12,000% to a revenue of \$1.3 million in 2024.

Homhedy, which makes similarly concealing furniture, dominates the litter box enclosures category, claiming a 6.5% share of litter box enclosure unit sales on Amazon. The company's sales in units nearly doubled in 2024 to reach \$6.2 million.

### Amazon Basics is top dog

Perhaps unsurprisingly, cat litter and related products vastly outsell housebreaking products for dogs. And the more limited range of products on the market has also allowed Amazon's own brand, Amazon Basics, to dominate the dog housebreaking category.

This is driven by the popularity of its pooper scooper bags and dog training pads, which claimed 18.5% of pooper scooper bag unit sales and 21.5% of all dog training pad unit sales, earning \$24 million and \$62 million in 2024 respectively.



***Some upstart brands have made major moves in the past year with automated cleaning items and products that include other innovative features.***

But while the range of products available for dogs is smaller, consumers have shown an interest in other brands and innovation within this category as well. Unit sales of HoneyCare dog diapers rose by 41.98% to bring in \$37 million in 2024, compared to a 13% decline in dog diaper units sold by Amazon Basics, which saw revenue fall to \$8.4 million.

Dog litter boxes are also a thing, with unit sales of Skywin's dog pad trays and splash guard enclosures up more than 1,600% to \$311,000 in 2024. However, consumers remain seemingly skeptical of most litter box-like arrangements for dogs.

Sales of Loobani's category-leading indoor dog turf potty system dropped 7% year-over-year in units to a revenue of \$1.4 million, and PickForLife's artificial grass dog pee pad unit sales dropped by 50% to \$1.6 million. Loobani and PickForLife sell 15% and 12% respectively of the dog litter boxes bought on Amazon.

### Addressing accidents and odors

For the occasional accident, Vansky makes the leading blacklight pet urine detector, which represents 44% of all urine detectors sold on Amazon, and posted 9% growth in unit sales in 2024, bringing in about \$4 million. But competitor Consciote now claims 14% of the urine detector market, after nearly doubling sales of its product year-over-year to earn \$873,000.

Odor control remains a perennially popular category for cat owners. Arm & Hammer, Rocco & Roxie Supply Co. and Nature's Miracle make Amazon's top-selling odor and stain removers for cats, earning \$4.9 million, \$16 million and \$12 million respectively.

Meanwhile, Nature's Miracle, Arm & Hammer and Resolve produce the top 3 odor and stain removers marketed to dog owners, with respective revenues of \$11 million, \$2.6 million and \$1.8 million. ♦



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