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# BEYOND THE LABEL

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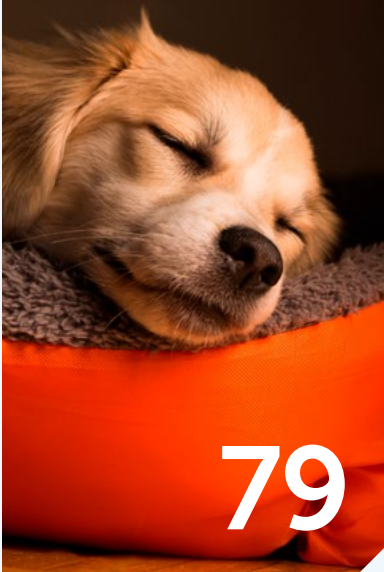
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# Eyes towards Asia

A couple of months ago, I travelled to Thailand, Vietnam and Cambodia. As soon as you get in a taxi from one of the airports in the region, you're immediately struck by the significant presence of delivery motorbikes navigating the traffic.

Bangkok, in particular, is a striking example of this phenomenon: quick commerce is everywhere. And it's clear that these platforms are increasingly catering to the growing demand of urban pet owners in Asia who want convenience at their fingertips, without having to leave their home.

This hunger for increased convenience in the Asian consumer market has not gone unnoticed: a growing number of pet players and brands are looking to this continent as the next step in their geographical expansion.

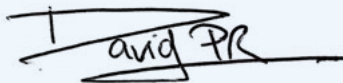
In this issue, we provide a more in-depth analysis of the pet industry in some of Asia-Pacific's most

promising markets, including Thailand, the Philippines, Vietnam and Cambodia.

We also take a closer look at the performance of pet supplies on JD.com, China's largest retailer by revenue. And, following our China Barometer in 2022, we have once again invited our readership to share its insights on the region. The results, which are also featured in this issue, show a sustained interest in conducting business with Asian markets.

Despite the headwinds and ongoing tariff situation, business appetite still seems strong.

Wishing you an inspiring read.



David Palacios Rubio  
Editor-in-Chief



“A business that makes nothing but money is a poor business.”  
HENRY FORD, US INDUSTRIALIST

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### Insect protein firms move to secure future

After filing for a safeguard plan in September 2024, alternative protein player Ynsect has secured €8.6 million (\$10.1M) in funding through the end of 2025, completed most of an operational restructuring and is in talks with possible investors to remain viable.

Meanwhile, French biotech firm Agronutris has received funding from the insect farming company La Compagnie des Insectes to save part of its operations. In September, it became the majority shareholder following an investment of more than €10 million (\$11.7M).

### Pet owners reveal their top toys

Among dog owners in Brazil, Canada, France, Mexico, the UK and the US, 7 in 10 say chew toys are their pets' favorites, according to a survey conducted by PETS International and Yummypets, powered by Loop. Dogs also love balls (65%), as well as squeaky (60%), plush (58%) and tug toys (50%).

More techy or sophisticated options take a backseat, with the survey revealing that only about a quarter of owners say their dogs prefer treat-dispensing toys (26%), and less than a fifth naming training options (18%), puzzle/interactive toys (17%) or frisbees (12%) as their dogs' favorites.

Cats prefer toys that encourage hunting, scratching and chasing, making teasing wands (66%), scratching posts (65%) and balls (59%) their favorites, owners say.

### Pet shops in Chilean capital double in 5 years

According to real estate consultancy Colliers, in just 5 years, the number of pet shops in Santiago has more than doubled, rising from 530 in 2020 to 1,159 in 2025.

Stores are booming, especially in areas with high population density and concentration of young families.

Data intelligence company Xbrein has calculated that the number of pet shops and related services across Chile has increased by 35% over the past 4 years, rising from 2,500 to almost 3,400 businesses. Nestlé Purina, meanwhile, projects that the Chilean pet food industry will grow by 37% over the next 5 years and has recently increased the capacity of its logistics network in the country by 60%.

### Pet Valu spends CA\$100 million on supply chain upgrade

Canadian retailer Pet Valu has opened a 295,000 sq. ft. distribution center in the city of Calgary. This marks the completion of its 4-year nationwide supply chain transformation to develop advanced distribution networks.

"By implementing a modern supply chain network that is capable of providing stores with flexible, reliable and accurate service, we offer world-class, on-shelf availability in store and online," says Nico Weidel, Chief Supply Chain Officer at Pet Valu.





### TNC acquires French fresh pet food player

The Nutriment Company (TNC) has announced the acquisition of Easy-BARF, a raw pet food producer for dogs and cats based in France's northwestern region of Pays de la Loire.

TNC aims to expand the Easy-BARF portfolio to include its recently launched range of fresh, gently cooked products. According to the Swedish company, the acquisition will also leverage its B2B capabilities to bring the products into the retail sector.

"This step will further strengthen the rapidly growing natural premium pet food market in France and make high-quality natural nutrition more accessible for pet owners across the country," the company says.

### Australian pet population swells by 10%

There are more than 31.6 million pets across 7.7 million households in Australia in 2025, according to a national pet population survey by Animal Medicines Australia (AMA) conducted in February and March 2025 among 2,450 respondents.

This represents a 10% growth from 2022, when the country registered around 28.7 million pets, and a 30% surge since 2016. This marks the biggest penetration of pets in households in recent years with pets now present in 73% of Aussie homes, rising from 69% in 2022, 61% in 2019 and 62% in 2016.

The AMA report also reveals that the Australian pet industry grew by 35% in the past 3 years, showing a strong demand for pet-related products and services. Based on its own research results and data from the Australian Bureau of Statistics, the AMA estimates that pet spending exceeded A\$21.3 billion (\$14B/€12B) in the 12 months to March 2025. "This represents a significant increase in spending compared to the revised 2022 expenditure total of A\$15.7 billion (\$10.4B/€8.8B)," states the AMA.



### High-earning couples in the US still spending big on pets

US couples with dual incomes and no kids (DINKs) are not immune to the challenging economic conditions arising from higher prices and interest rates – but it seems they are not willing to cut back on pet care.

According to a survey by American insurance comparison website Insurify, 70% of DINKs are willingly making financial trade-offs to care for their pets, some even at the expense of their long-term savings or health coverage.

These couples spend an average of \$158 (€135) per month or around \$1,906 (€1,634) per year on their pets, covering items such as food (87%), treats (77%), toys (61%), vet care (47%), medication (35%), grooming (28%) and even tech such as monitoring devices (6%).



### South Korean pet numbers rising

According to a report by Korean financial services firm KB Financial Group, pet ownership in South Korea is steadily increasing, with over 15 million citizens (roughly 30% of the population) owning pets as of December 2024. During the same period, approximately 5.91 million households (27%) nationwide owned pets, representing a 60,000 year-on-year increase.

Nearly 8 in 10 owners expressed contentment with raising pets, up 8.7 percentage points from the same period last year. Those intending to continue raising pets rose to 74%, up 11.4 percentage points, while those willing to recommend pet ownership to others increased by 7.5 percentage points to 49.4%. In 2024, South Koreans spent an average of ₩194,000 (\$142/€131) per month on pets, rising 6.8% from ₩154,000 (\$113/€104) registered 2 years earlier.

However, approximately 80% of South Korean pet owners leave their pets at home alone at least once a day for an average of 5 hours and 54 minutes. The nationwide report was based on a survey of 2,000 pet owners aged 20 to 69.



### Airlines and regulators reshape how pets fly

Government regulations are playing a key role in shaping how pets are transported by air, with new and updated rules across different regions.

In May, the Italian National Civil Aviation Authority (ENAC) approved a rule allowing pets to travel in the cabin instead of the cargo hold. Pets weighing 8-10 kg are now permitted in the cabin, subject to airline restrictions.

Across Asia, Air India, Asiana Airlines, Etihad Airways, Korean Air and Jin Air allow pets in cabins on select routes. China is also expanding pet-friendly air travel with several domestic carriers, including China Southern Airlines, China Eastern Airlines, Hainan Airlines, Juneyao Air and Spring Airlines, now allowing passengers to bring pets in the cabin.

### UK pet care licensing fees climb as services expand

An analysis by UK industry body the Pet Industry Federation (PIF) suggests a shift toward daycare and home-based care risks being undermined by inconsistent reporting and wide fee disparities, which make fair competition and effective policy planning difficult.

According to the conclusions, first-year business license fees increased by 9%. The report also analyzes the increase in pet-related commercial licenses in the UK between 2024 and 2025, which averaged 9%.

The report recorded the results from 272 local authorities in 2025 and 263 in 2024. The PIF uncovered cost disparities among local authorities, as some of them charge fees as high as £1,536 (\$1,889/€1,782) for a selling-animal license, tripling the average.



### United Petfood and Kika ramp up production in Eastern Europe

Belgian pet food manufacturer United Petfood has opened a factory in the Polish town of Jedlińsk. The facility, which received an investment of €50 million (\$58.4M), will produce wet food in pouches for dogs and cats.

Lithuanian pet food company Kika Group, meanwhile, has completed construction of a second plant for its production arm, Akvatera W, in Kaunas, about 102 km from Vilnius, to manufacture dry extruded dog and cat food, as well as food for rodents and birds. The plant features 1 production line with the potential to expand to 3.

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DATA INSIGHT

16%

of C-suite leaders have travelled with their pets on business trips, according to a survey by travel booking platform TravelPerk.



TOP 3 INVESTMENTS

The European Bank for Reconstruction and Development (EBRD) acquired a minority stake in Turkish pet food producer **Çağatay**.

London-based startup **Lupa Pets** announced a \$20 million (€17.2M) investment round to develop the "world's first veterinary AI lab".

Singaporean pet nutrition company **BOM BOM** concluded its Series Pre-A funding round of S\$3.5 million (\$2.7M/€2.3M).

NEW APPOINTMENTS

**Croci-Camon**

Francesco Iovine becomes CEO following the merger between the Italian pet players.

**Freshpet**

Ivan Garcia, current Vice President of Finance, has been named Interim Chief Financial Officer, replacing Todd Cunfer.

**Zooplus**

The German online pet retailer has appointed ex-Tom&Co chief Lionel Desclée as its new CEO.

TOP WEB NEWS

**Iran's dog-walking ban**

Restrictions in cities are challenging the country's emerging pet industry.

LATEST NEWS





# Bright future predicted *for private labels*

The in-house brand pet food sector is flourishing – particularly in Europe where it often registers higher shares of the market compared to other product categories.





**Tom Prendergast**  
*Director of Research Services*  
PLMA

With rising numbers of pet households across the world, and consumers looking for affordable options to feed their pets, retailers have good reason to expand their lines. The latest data provides evidence of how things are developing in this segment.

### Global expansion fuels growth

Pet ownership has grown globally, especially since the COVID pandemic. In the US, 51% of households own a dog, while 37% have at least 1 cat. Some 94 million households now have a pet, an increase of 12 million since 2023, according to the American Pet Products Association (APPA).

A total of 340 million households in Europe are pet owners, with 105 million cats and 91 million dogs in European homes.

With the growth in household pets, store brands have reaped the benefits. In the US, pet care private label sales reached \$5.5 billion (€4.7B) in the 52 weeks to 13 July 2025. This is an increase of 2.4% against the same period of 2023-2024.

### US and European numbers

Some of the largest private label categories in the US include dog food (\$1.3 billion/€1.1B – 12.6% share), dog treats (\$1.1 billion/€0.9B – 22.2% share) and pet toys (\$262.7 million/€224.9M – 37.5% share). In unit sales, dog food (223 million – 18.3% share), cat food (216 million – 10% share) and dog treats and chews (180 million – 24.7% share) also reflect the popularity of pet products among US consumers.

This pales in comparison to Europe, however, where private label pet food sales now have some of the highest penetrations among the sales tracked by the Private Label Manufacturers Association (PLMA) and NielsenIQ in 17 countries.

### Comparison with branded products

In private label overall volume and value share, pet food is strong when it comes to category sales volume. For the 3 months to 26 May 2025, 13 of the countries

tracked by PLMA and NielsenIQ had a volume share of 40% or more.

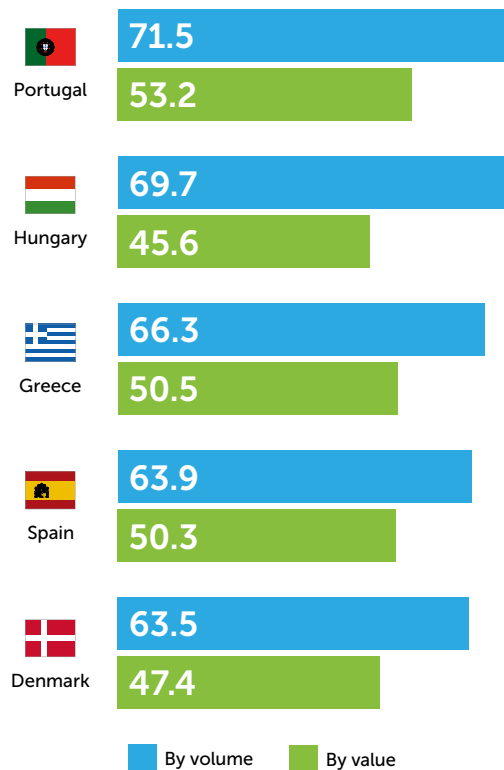
Portugal (71.5%), Hungary (69.7%) and Greece (66.3%) lead the way in share of unit sales. In value, 7 of the 17 countries have a private label share of over 40%, with 3 of them above 50% – Portugal (53.2%), Greece (50.5%) and Spain (50.3%).

### Share vs other categories

The PLMA Sales Dashboard tracks 11 categories, including alcoholic beverages, confectionary and snacks, ambient food, frozen food, health and beauty, healthcare, homecare, nonalcoholic beverages, paper products and pet food. The private label share in the pet food category is often among a country's top-ranking ones. [▶ SEE NEXT PAGE](#)

## Leading European markets in private label pet food

(market share, in %)



Source: PLMA/NielsenIQ (May 2025)

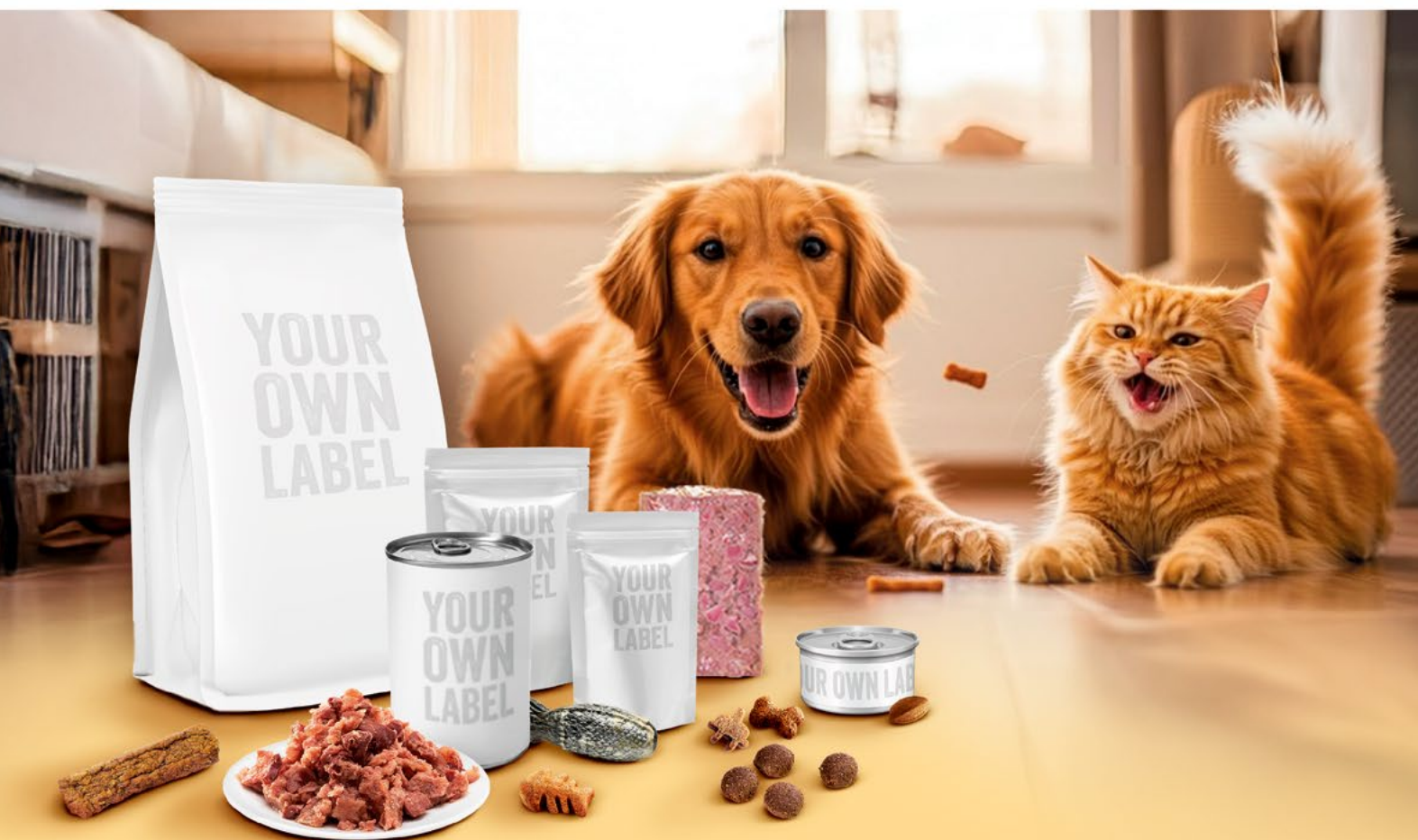
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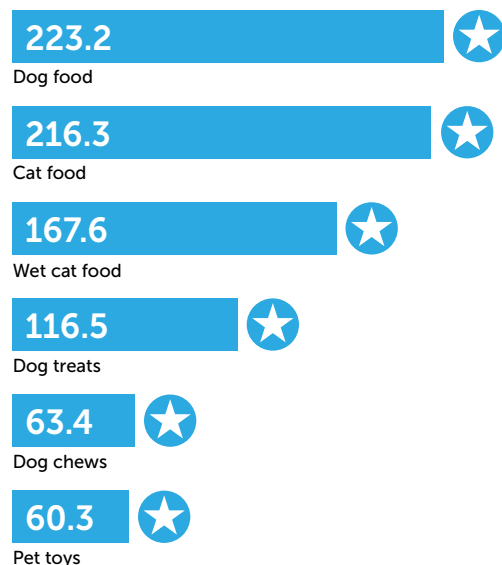
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## Total private label sales in the US (in million units\*)



Source: PLMA/Circana Unify+ (52 weeks to 13 July 2025)  
\*Includes only products above 1 million in units in sales

Own label pet food products have the top share of all categories in private label sales volume in 4 countries: Hungary (69.7%), Greece (66.3%), Denmark (63.5%) and the Czech Republic (59.1%). In Austria (61.8%) and Poland (52.3%), pet food ranks second behind paper products. Overall, private label pet food sales are in the top 5 private label sales volumes in 13 of the 17 countries tracked by PLMA.

A similar picture can be seen in sales value. In Greece, own label pet food sales rank first in the 11 categories, with a 50.5% share. Hungary and the Czech Republic come second, with 45.6% and 37.6% respectively. Strong sales are also seen in Denmark (47.4%) and Poland (43.1%), where pet food is in third place. Overall, private label pet food ranks in the top 5 in sales value in 11 of the 17 countries.

### Further opportunity for advances

Although all this might seem to indicate that growth in private label has reached a peak, which might suggest a lack of opportunity for future growth, the most recent

numbers tell a different story. Since 2023, pet food sales for store brands have experienced growth in 10 of the 17 countries in volume share and in 6 of the 17 countries in value share.

The Czech Republic has grown the most, with a 4.1% increase in volume during this period, followed by Switzerland (+2.7%), Greece (+2.4%) and Sweden (+2.1%). This is especially interesting given that Sweden (11.4%) and Switzerland (40.3%) have the lowest private label volume share of pet food, but the numbers demonstrate its promise as a growing category.

In value, there is a similar picture. Denmark has seen an increase of 4.2% since 2023 in pet food sales, while France (+1.5%), the Czech Republic (+1.3%) and Sweden (+1.1%) have also shown steady growth. Once again, France – with 24% – and Sweden – with 6.9% – have 2 of the lowest penetration rates for private label sales value, but growth reflects the potential for store brand products to win over consumers.

### US expansions and launches

Perhaps the best indicator of private label growth for pet products comes from retailers on both sides of the Atlantic. In the US in the past 6 months both Target and Associated Wholesale Grocers (AWG), which operates over 3,400 independent stores, have made major announcements.

Retail giant Target has announced it is redesigning its Boots & Barkley pet line and is also adding 150 new products to the line, which was launched in 2011.

In a press release, Amanda Nusz, Target's Senior Vice President of Merchandising, Essentials and Beauty, said that 70% of Target customers own pets and 30% of shoppers purchase pet products from them: "The new Boots & Barkley reflects our focus on high-quality, stylish and affordable pet accessories that help our guests treat, celebrate and connect with their furry family members."

► SEE NEXT PAGE

***In the US, pet care private label sales reached \$5.5 billion in the 52 weeks to 13 July 2025 – an increase of 2.4% against the same period of 2023-2024.***

AWG, meanwhile, is just entering the private label pet product market with the launch of Pure Wonder by Best Choice. It has debuted with 80 products. The company promises the products will be high quality but also provide value for consumers.

### European brands join the club

In Europe, the retail sector is also focusing its efforts on the pet market. Recently, German retailer Kaufland launched its first private label premium pet food brand in its stores under its K-Carinura line, which now offers over 85 high-quality products.

This has been so successful that Kaufland is now expanding, with the K-Carinura Naturals product line promising no preservatives, grains, sugar or colorings. Currently, this new line includes over 30 products, but the company plans to expand to over 60 items.

Other companies are extending their pet product offerings with new stores and dedicated programs. The REWE Group in Germany has announced that its ZooRoyal pet store company is expanding nationwide in 2026. While no exact number has been released, the rollout is expected to be in double digits.

In Spain, Carrefour has launched the Pet Club, which Carrefour Club members can access through an app. Benefits include up to 5% savings on pet food purchases, free access to digital passport services and a veterinary chat with Petpass, funded by Carrefour Club.

Another Spanish retailer, DIA, has added almost 60 products to its Deligato and Deliperro private label pet lines – dry and wet pet food endorsed by veterinarians.

### Pets and their humans

Some major pet retailers in the US have also recently announced the addition of private label pet products and, in a twist, products for their owners. Pet superstore chain PetSmart, for example, has introduced the Thrills & Chills collection, which features a variety of Halloween items for pets and includes an assortment of costumes, apparel, accessories, toys and treats.

Meanwhile, Petco is also expanding its product range in a new direction, with the launch of a collection designed for use by pet parents. The My Human line is a selection of pet-themed products, including apparel, decor for the home and workplace, games, toys, accessories and seasonal items. ♦

### The pet world according to the experts

The future for pet sector sales overall looks promising. According to the European pet food industry body FEDIAF, sales of pet products are projected to grow by 4.1% in Europe by the year 2026. This growth could come from the increasing demand for organic and free-from pet food, as more owners seem to want to ensure the health of their pets and reduce the number of processed foods in their pet's diet.

According to Euromonitor, the Asia-Pacific pet care market reached \$29 billion (€24.8B) in 2024, making it the third-largest pet market in the world. Euromonitor expects sales growth there to be around 4% in the next 5 years, keeping pace with growth in the US and Europe.

This is not surprising, as pet adoption has skyrocketed in Asia during the past decade.

According to a report by Allianz Global Investors, 60% of the population in the Asia-Pacific region now has a pet at home.

Investment bank Goldman Sachs projects this to be especially true for China, expecting 8% pet food growth in China over the next 5 years. There is good reason to see why this might be possible. In China, dog and cat ownership is now at 22% of households, or a total of 120 million according to iMedia Research. In addition, 60% of Gen Z are expected to adopt pets in the future.

The rise of Gen Z pet ownership is not limited to China. According to APPA, the fastest growing generation of pet owners in the US is Gen Z. Over 18 million Gen Z households now own a pet, with 70% of households reporting more than 1 pet, making it the largest multi-pet-owning demographic.



# Private label pet food: 3 unignorable trends

Private label is being pushed to new heights by changing consumer expectations. Which main trends are driving this shift?



**Nazar Shchyryba**

Head of Private Label Projects  
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kormotech.com

Private label has shifted from a price play to a core competitive lever across all pet sales channels: supermarket, specialist and online.

Supermarkets are traditionally private label innovators, and move ~43% of pet food volume (Mordor Intelligence). But the upgrade is industry-wide, and pet consumers are pushing everyone to raise quality, rethink packaging and expand into higher-margin snacking.

## Premium by design

Private label is no longer seen as only the budget-friendly option. According to the 2024 Power of Private Brands report from the Food Industry Association, 42% of shoppers named quality as the key factor in choosing private label, compared to 30% in 2023. McKinsey Insights reports that more than 80% of consumers believe private label products match or even exceed the quality of national brands.

These consumer expectations can be met by making premium quality a central focus in private label pet food. Growing awareness among pet owners of nutrition's role in health creates demand for premium formulas with strong palatability at competitive prices.

## Packaging that meets demands

Consumer demand for sustainability is clear: a PETS International and Loop survey found that 46% of pet parents choose sustainable packaging to reduce

environmental impact. At the same time, 21% value convenience, expecting packaging to help save money and reduce waste. Retailers can respond by prioritizing eco-friendly solutions across categories.

In wet food, this means replacing flow packs with cardboard sleeves for pouch multipacks, which are perceived as more sustainable and practical. In dry food, requests for eco-friendly options are driving manufacturers to test lighter-density polyethylene bags that are easier to recycle while maintaining strength and product stability.

## Snacks as a growth engine

As pets take on a more central role in households, spending on treats is growing fast. According to DataHorizon Research, the global pet snack market reached \$23 billion (€19.6B) in 2023 and is expected to nearly double by 2033.

This growth opens opportunities well beyond traditional biscuits and chews. Unconventional formats are gaining traction, including soups, creamy snacks and meat-based desserts. Some retailers are reorganizing their pet food aisles, dedicating separate shelves for treats and expanding private label opportunities in this fast-growing category.

To capture these opportunities, retailers need partners with the scale and expertise to deliver innovative concepts quickly and reliably. Kormotech combines global production capacity with more than 25 private label partnerships worldwide, helping retailers turn consumer trends in treats into profitable, differentiated assortments. ♦



**FIDES PETFOOD** BELGIUM/FRANCE

## Family-owned firm fuels private label expansion

**How does a heritage player stay competitive in Europe's private label market?**

Active in the pet food industry since 1989, Fides Petfood combines decades of expertise with a strong entrepreneurial spirit. Since 2023, the company has been fully independent and no longer part of Group Depré, reinforcing its identity as a business dedicated exclusively to pet nutrition.

### Family-owned expertise in pet nutrition

Fides Petfood is a fast-growing specialist in private-label pet nutrition, operating state-of-the-art production sites in Belgium and France.

The company offers a range of high-quality dog and cat food, including affordable mid-range, premium and super-premium dry food, and even veterinary diets. More recently, it has expanded into semi-moist products with high palatability and introduced a new range of premium functional snacks for dogs.

### Strategic investments

Fides Petfood has scaled significantly in

both capacity and processes. Investments totaling €25 million (\$27M) in 2024–2025 have been directed towards personnel, production technology, warehousing and IT infrastructures.

As a result, the company has increased its annual production capacity to 150,000 tonnes, positioning it among the larger players in the European private-label pet food segment.

### State-of-the-art certified facilities

The dual-site setup allows Fides Petfood to maintain full control and in-house expertise across every step of the supply chain. From concept and recipe development to production, packaging, quality control, logistics and export documentation, the company ensures high OTIF service levels and consistent product quality.

Certified sourcing and packaging demonstrate the company's sustainability efforts. Ingredients include MSC-certified fish and FSC-certified packaging

materials. Both production sites operate under strict quality systems and hold IFS Food Version 8 certification, ensuring safety, traceability and consistency.

### Partner of choice

Fides Petfood positions itself as a strategic partner for retailers, franchises and e-commerce players seeking private-label solutions. Its specialized teams in nutrition, marketing, packaging innovation and regulatory compliance support clients in turning ideas into finished products with strong market potential.

With Europe as its core market, Fides Petfood serves companies looking to combine reliability, scalability and innovation, with an emphasis on long-term partnerships. Companies aiming to elevate their brand, collaborate on private label or launch new pet food lines can benefit from Fides Petfood's expertise, scale and dedication. ♦

### Fides Petfood

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[fidespetfood.com](https://fidespetfood.com)





## Industry barometer: China remains key for pet businesses

**Despite economic slowdown and trade tensions, most companies are still actively working with the Chinese market, reflecting its enduring importance.**



**Thaís Matos**  
*Senior Business Reporter*  
*GlobalPETS*

As the world's second-largest economy, China has been the subject of global interest this year as growth slows and the country faces a trade war with the US alongside domestic issues in the property market.

### Positive trade balance for China

A new GlobalPETS industry barometer reveals that 66% of pet firms are currently engaging in some type of business with China. This shows a modest rise in comparison with research conducted in 2022, when the figure stood at 61%.

According to the findings from this survey, which was conducted among more than 40 pet industry players, the overall balance of trade is positive for China.

Nearly 4 out of 10 respondents (39%) indicate that they are importing Chinese products, a similar figure to the 2022 barometer (40%). Meanwhile, 27% are exporting their pet products to China in 2025, an increase of 6% from 3 years ago.

The 2025 barometer also shows that 17% of the respondents who are not yet present in the Chinese market would like to start doing business with the country, while 17% say they have no plans to do so in the near future. The number of pet companies that are not looking to do business with China has increased by 4 percentage points since 2022.

The majority of pet companies importing from China (75%) expect the country will remain a valuable sourcing market for them, both now and in the foreseeable future. However, almost one fifth of respondents (19%) plan to look for more local suppliers in the future and do less business with China, and 6% are already looking for suppliers closer to home.

### Keeping options open

An overall increase is visible in the number of firms that do not yet do business with China but might in the near future. Half of the respondents say it is "somewhat likely" that their companies will sell to or buy from China within the next couple of years (up from 21% in 2022). The degree of certainty has decreased significantly, however, with only 7% describing this possibility as "very likely" (down from 28% in 2022).

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At the other end of the scale, the 2025 barometer also reveals a rise in the proportion of businesses that are “somewhat unlikely” (from 8.3% to 14%) or “very unlikely” (from 19.4% to 29%) to trade with the country.

### Barriers to business

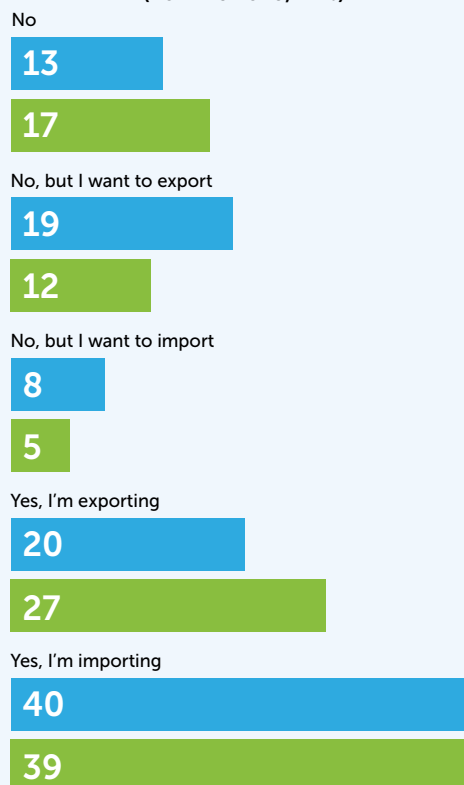
According to respondents, there have only been modest changes in the challenges associated with doing business with China since 2022. Companies continue to cite administrative and regulatory issues as their main concerns.

Compared with 3 years ago, however, more companies now see market competitiveness as a challenge (up from 16% to 26%). The survey also highlights concerns about finding local representatives or agents, marketing effectively towards Chinese consumers (18%) and addressing the language barrier (5%). Of the respondents not currently doing business with China, 71% say they have never tried to set up a partnership. 14% have tried, but report encountering barriers due to bad partnerships. Another 14% indicate that the collaboration didn’t work out for other reasons.

Finally, 6 out of 10 respondents – coming mostly from Europe and North America – think that there will be a general shift to more local suppliers in the global chain, but that China will continue to have an important position in the future. ♦

### ‘Are you currently doing business with China?’

(2022 vs 2025, in %)



Source: PETS International China Barometer

### Tariffs may hit 3 out of 10 pet firms

In terms of the impact of the current tariff situation, 53% of the respondents foresee some kind of effect on their company’s trade with China. 23% of them expect to do more business with the Asian nation, and 30% expect to do less.

Despite the US and China having threatened each other with more than 100% tariffs on traded goods earlier this year, in August US President Donald Trump extended the truce between them for another 3 months. The countries have until November to try and negotiate an agreement.

Also in August, China reported that its export growth had slowed to the lowest level in 6 months,

and its year-on-year shipments to the US had fallen by more than 33%. These figures led analysts to lower their projections for Chinese economic growth in 2025 and 2026.

The Asian country is a strategic trade partner for pet companies around the world. From a US perspective alone, it was the third largest export destination by value last year, representing \$1.27 billion (€1.08B), behind only Canada and Mexico, according to the American Feed Industry Association (AFIA). Meanwhile, US pet firms imported \$549 million (€467M) in ingredients and animal food products from China, with dog and cat food accounting for the third largest share.





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# What's driving China's next-generation pet owners?

JD.com research shows some significant changes in the past year. Which types of products are consumers now buying on its platform, and why?



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



**Jian Feng**  
*Contributor*  
*PETS International*

The pet industry in China is booming, driven by increased product purchasing and changing views of pets. Data from the Chinese e-commerce giant offers a closer look at consumer behavior, revealing a fast-growing demand for specialized products alongside the effects of emotional bonds on sales.

## Reasons for having a pet

According to a recent survey conducted by JD.com among 1,000 respondents, pets in China are increasingly likely to be treated as part of the family. Almost 60% of them say they regard their pets as close relatives.

Seeking emotional value is given as the main reason for keeping a pet, with more than 80% of owners having pets to prevent them from being lonely, while more than 40% do so to relieve boredom.

## Retail channel preferences

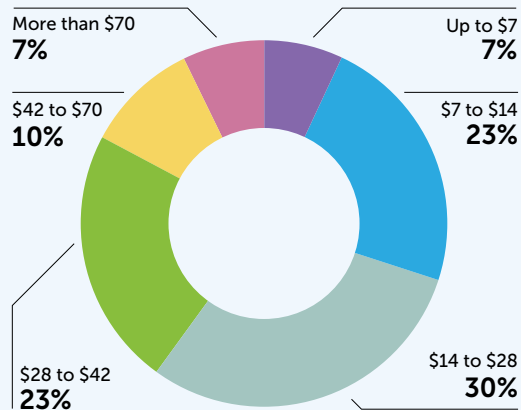
When asked to name other retail channels they use to buy pet food and supplies besides general platforms

such as JD.com, the main answers given by the survey respondents are specialized pet web shops and offline stores. Respondents to the survey are less likely to buy from their vets.

On the other side, they are highly responsive to online promotions and discounts. While more than 60% of them buy the food and supplies they need at least once a month, 54% stock up on goods when there is a sales promotion.

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## 'What is the typical amount you spend on pet food?'



Source: JD.com pet consumer survey (n=1,000)





The typical amount a Chinese pet consumer spends per transaction is between ¥100 (\$14/€12) and ¥300 (\$42/€36), with almost 53% of the respondents indicating this when asked. More than 17% of the respondents say they spend more, while some 30% spend less.

### Pet food choices

In the past year, pet food sales on the JD.com platform have accounted for 60% of its total pet product sales. The number of pet food buyers shows substantial growth compared to the previous year: +39% for dog food and +48% for cat food.

Sales of senior dog food on the platform have increased significantly, and in 2024 they rose by 67% compared to the previous year, and the number of transactions increased by 87% year on year. The related keywords search also increased by 62%.

The survey findings show that owners' pet food choices are, in general, based on specific age, breed and body type (63%), brand (62%), ingredients (61%) and functional properties like helping digestion (51%), followed by price (38%) and packaging (33%).

### Combining dry with wet

Although the largest proportion of pet food transactions are still dry products – for cats 54% and dogs 60% – the year-on-year sales volume of wet food increased by more than 260%. Despite this growth, dog wet food only accounts for 3% of dog food transactions, while cat wet food represents 11%.

Over 80% of the respondents combine dry food with wet food. Overall, the primary rationales for both dog and cat owners buying wet food are because the pet enjoys eating it, for enhancing nutrition, to replenish water and to use it to interact with their pet.

### Plant-based cat litter

Cat litter accounts for nearly 60% of JD.com sales in pet cleaning products, with the number of cat litter users growing by 44% in the past year. The 2 main reasons for purchasing a particular cat litter product are the type of litter and the brand.

Within the segment, plant-based cat litter is increasingly popular, because of its non-stick, water-absorbing and clumping properties. Sales have rocketed in the past year, with a growth rate of 307%. And the search volume for cassava cat litter has increased by a factor of 10 year on year.

### Pet parents on the move

A high proportion of sales in the pet travel supplies category is, understandably, accounted for by leashes and harnesses: almost 50%. But other outdoor accessories, including bark control devices, are also performing well, with sales growing by 58% year on year and the potential to grow further as more products are launched.

There is an interesting trend in anthropomorphic products too. With pets seen as family members who might need special care, pet strollers can be a solution.

***Plant-based cat litter is increasingly popular – sales have rocketed in the past year, with a growth rate of 307%.***

Search volume for these increased by 68% in the past year, with transaction volume increasing by more than a factor of 10.

### Reptiles on the rise

Aquarium and bird product sales are firmly at numbers 1 and 2 of exotic pet sales, with substantial rises year on year, but products for reptiles are currently showing the highest growth rate.

There are significant differences between owners of different types of exotic pets when it comes to the types of products purchased at JD.com. The majority of reptile and aquarium sales in the past year were supplies rather than food, approximately 80% vs 20%, whereas for rodents, birds and rabbits, food and supplies are sold in roughly equal proportions, with slightly more food than supplies for birds and rabbits.

### Demographics and social media

Sales data shows that the under-25s buy more products for small or exotic pets, while older pet owners buy more aquarium products. Owners of exotic and aquarium

pets give different motivations for wanting to have their particular type of pet than cat and dog owners.

Most of the respondents in the survey say they have them for social expression and content creation, followed by an expression of their personality and aesthetics.

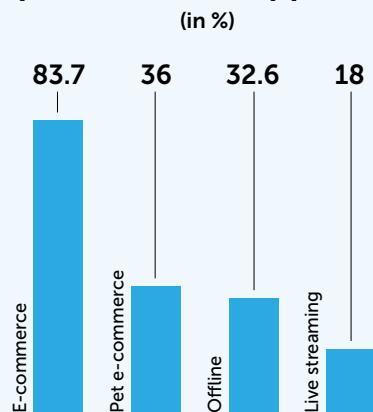
### Demand for smart products

The fast-growing technology sector also benefits the pet industry in China. JD.com has noticed this too, with search volume for smart pet products increasing significantly in the past year, particularly for pet air purifiers (+202%) and cameras (+128%), but also for dryers and collars.

As a reason for buying smart pet products, 68% of the survey respondents say they want to improve efficiency and reduce their daily care burden. 65% of them want to use these innovative products for remote care.

There remains room for product improvement, as users also expose many of the pain points after purchasing innovative products. The biggest problems respondents encounter are systems that don't link with other systems or apps, and pets being scared of the product or uncooperative. ♦

### 'Which channels do you mainly use to purchase pet food and supplies?'\*



Source: JD.com pet consumer survey (n=1,000)  
\*Multiple responses allowed

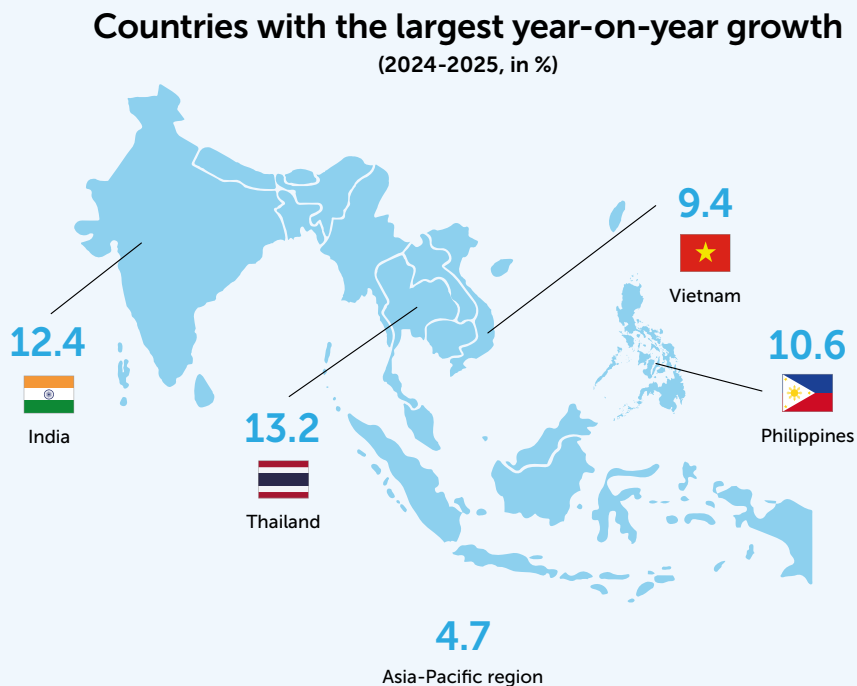
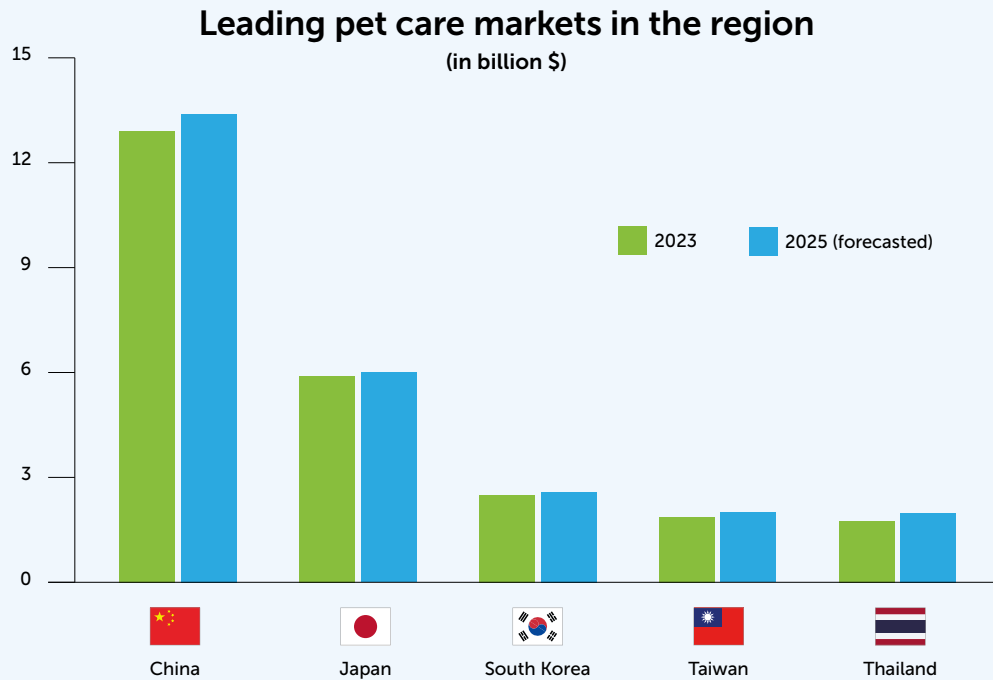
### Cats vs dogs

According to the 2025 China Pet Industry White Paper, sales of dog and cat products in urban areas in China grew by an average CAGR of 10% between 2021 and 2024, from ¥206.5 billion (\$29B/€24.7B) to ¥300.2 billion (\$42.2B/€35.9B).

Cat products have seen the fastest growth, with a CAGR of 13%. This marks a significant growth from 43% of the revenue to 48% over the 4-year period, due to a 10% increase in the cat population.

Although the number of dogs remained stable in the same period, they are more expensive to keep as pets: costing an average of almost ¥1,000 (\$140/€120) more per year due to their higher food intake, grooming needs and medical expenses.

# Asia's pet care landscape: biggest markets and fastest growers



Source: Euromonitor International



# Retail transformation in India powered by speediest type of commerce

Currently operating across 70 cities, the quick commerce market is set to reach 100-120 urban areas in the world's most populous nation by the end of the decade.



**Mrigank Gutgutia**  
Partner  
Redseer Strategy Consultants



**Jasbir S Juneja**  
Partner  
Redseer Strategy Consultants

The Indian retail market, now valued at \$1,000 billion (€861B), is poised for rapid expansion over the next 5-6 years. E-commerce is growing on the back of multiple factors, with quick commerce (q-commerce) as one of the key growth enablers.

## Q-commerce vs e-commerce

E-commerce refers to an online purchase or sale of goods or services, which can take 1 or more days to deliver, whereas q-commerce aims to deliver in a 10 to 30-minute time span. It is therefore e-commerce in a new, faster form, and is sometimes also referred to as 'on-demand delivery'.

Instead of traditional warehouses on the outskirts of towns and cities, q-commerce players operate from micro-warehouses ('dark stores') strategically located near the point of delivery, to ensure a quick turnaround

from order to doorstep. These can be anywhere between 300-700 sq m in size and tend to stock 10,000-12,000 different items.

Their staff are a fleet of individuals ready to spring into action at any moment. This provides the q-commerce business with the ultimate agility and flexibility required to adeptly respond to customer demand, round the clock.

## Rising number of users

The q-commerce sector in India is currently valued at \$5 billion (€4.6B), less than 1% of the overall Indian retail market. But it is expected to grow between 50-60% from 2024 to 2030, reaching \$59 billion (€51B) to \$87 billion (€75B)\* by 2030. This will mainly result from major expansion in the larger cities, but the gross merchandise value (GMV) contribution of non-metro areas has already increased by 7% year-on-year, now accounting for 13% of GMV.

Rising user interest in q-commerce is due to the appeal of its key offerings – faster service and a wider assortment per dark store – and providing consumers with their favorite product at the click of a button. Add to this convenience the promise of better pricing and you have key drivers for strong user growth.

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The number of monthly transacting users rose from 10 million in 2023 to over 20 million in 2024, signaling the growing adoption and integration of these platforms in daily routines. While q-commerce is predominantly used for everyday items such as staples, fresh food and fast-moving consumer goods, the emergence of new categories such as clothing, beauty and personal care, electronics and pet care shows how the system can also be used.

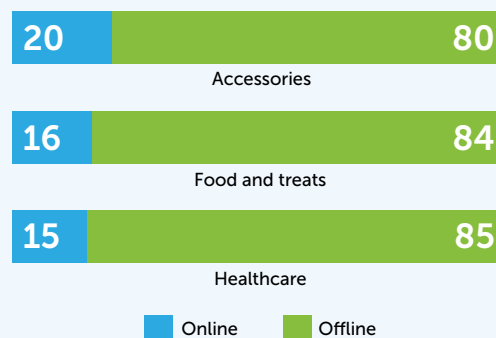
### Growth predicted for pet care

India has approximately 32 million pets, with pet ownership rising. According to a report by Redseer Strategy Consultants, India's pet care market reached \$3.6 billion (€3.1B) in the 2024 fiscal year, doubling since 2020, and is projected to grow to \$7 billion (€6B) to \$7.5 billion (€6.5) by 2028 at a CAGR of around 20%.

While offline, constituting around 94% of the market, remains the dominant channel for pet products and services, the online channel is now fast emerging to be a growing segment driven by e-commerce and q-commerce expansion. The online channel is expected to grow at 40-50% for the next 5-6 years, potentially capturing 25-35% of the overall pet care market by 2030.

As of 2022, offline pet food distribution stood at 75,000 retail points, which was minuscule compared to 10 million retail outlets nationwide. However, with online channels now covering most of the pincodes (postal codes) in the country, it has never been so easy for consumers to access online services.

### Where do Indian consumers buy pet products? (in %)



Source: Redseer (n=493 Indian pet owners)

### Wider range on offer

Q-commerce is a fast-mobilizing channel with multiple brands seeing more than double-digit sales coming from it. Redseer data on one of the q-commerce businesses shows a 52% increase in the SKU assortment of pet care products on the platform.

Dog-related products make up 75% of the SKU assortment of pet care products and have seen an approximate 65% year-on-year increase in q-commerce assortments. Within this channel, brands such as Pedigree, Drools, Heads Up For Tails and Whiskas are some of the key players offering a wider and premium assortment. ♦

\*Based on \$1=₹83





Country report: Thailand

# Will the boom in Thai pet food exports continue?

It's one of the most rapidly growing pet sectors in its region but, while Thailand's competitive outlook is encouraging, new tariffs could prove to be an obstacle.



**Thaís Matos**

Senior Business Reporter  
GlobalPETS

According to Euromonitor International, Thailand's pet care market has a projected growth rate of 8.7% by 2029, making it one of the fastest-expanding in the Asia-Pacific area. The country's companion animal population has also been rising in recent years with market research revealing it is home to 20.8 million pets as of 2025 – a number that is expected to hit 21.3 million next year.

## A strategy for growth

The government of Thailand has a bold goal: to make it one of the top Asian countries in terms of trade competitiveness by 2027 – and the pet food market is an important part of this strategy.

In the first 7 months of 2025, Thailand exported 639,541 tons of pet food around the world, generating \$1.9 billion (€1.6B), according to TradeMap data presented by the Thai Pet Food Trade Association. This value is 11% higher than the same period last year.

From 2023 to 2024, the country rose 2 positions in the global export ranking for the sector and became the second-largest exporter of pet food. It has now surpassed the US and France, and is outranked only by Germany.

2024's growth was significant compared to the year before. Thailand recorded a 19% rise in quantity and an impressive 29% surge in value, recovering from losses in 2023. This positive scenario is made possible by a combination of factors turning Thailand into an attention-grabbing trade partner. These include low production costs, trade agreements with 15 countries and a well-established manufacturing sector.

i-Tail Corporation – one of the country's most prominent pet food producers – announced a 5.3% quarter-on-quarter rise in sales in the second quarter of 2025. This was pushed by new projects in the US and the first shipments to new importer brands in Europe.

## Seizing regional opportunities

Thai pet food exports have found strong demand across Asia. Last year, for instance, government officials advised manufacturers to focus on exporting cat food to Japan to profit from its rising cat ownership.

The country is the second-largest importer of pet food for dogs and cats so far in 2025, showing slight growth from the same period last year.

Malaysia, the Philippines, India and Taiwan are also among the top 10 pet food importers and Thailand is already the leading source of imports in Taiwan to address the country's growing demand.

### Tariff uncertainty

There's a potential obstacle to Thailand's momentum, however. Since 1 August this year, Thai goods face a reciprocal tariff rate of 19% in the US, which is by far the largest importer of Thai products across all pet categories. In fact, these products account for about a third of the value exported by the Asian country.

Although, after intense trade negotiations between the countries, the tariff is lower than the 36% originally announced in July, it may still affect Thai performance. The Bank of Thailand forecasts a prolonged impact on international trade.

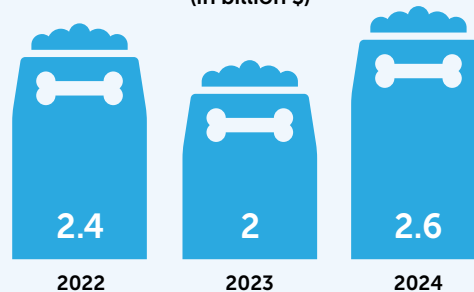
"Exports would be impacted through 3 channels: direct impact on exports to the US market; indirect impact through the supply chain ultimately exported to the US market; and impact from slowing trading partners' demand as the global economy slows down," states the organization in its analysis.

To soften the blow, Thailand is tapping into other strategic markets. Together, the 28 countries of the European Union are one of the top 5 largest importers

of Thai dog or cat food. From January to July 2025, the import value in the EU rose by 9% in comparison with the same period last year. Meanwhile, China has increased its import value by 43% and the Middle East by 38%.

By continuing to expand its exports across diverse trading partners, Thailand's pet food sector can ensure it remains at the forefront of the country's drive to competitiveness. ♦

### Thai pet food exports (in billion \$)



Source: TradeMap/Thai Pet Food Industry Association

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Country report: the Philippines

# A growing force in Asia's pet market

With nearly half of Filipino households owning a cat or dog and double-digit import increases, the country's industry is on an upward trajectory.



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



**Diana Dominguez**  
Business Reporter  
GlobalPETS

The largest increase seen over the past 4 years is in the cat population, with 5.2% growth (CAGR) compared to 2021. Dogs (4.7%) and fish (3%) follow. For the next 5 years, the country's pet population is expected to increase but at a slightly slower pace (3.1%). Cats will continue to lead growth (3.3%), but dogs are expected to close the growth gap (3.2%).

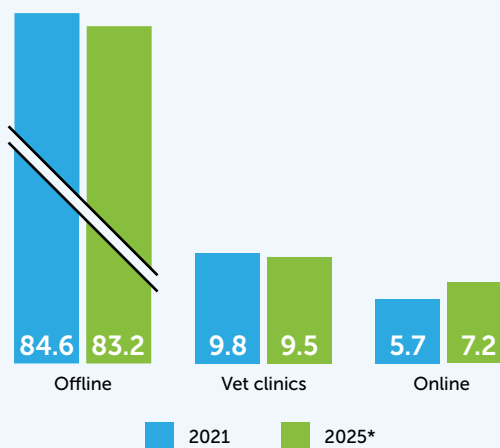
The pet premiumization trend is fueling the industry in the Philippines, with more owners willing to spend on food and other essentials. For 2025, Euromonitor International's forecast for pet food retail sales is \$407.4 million (€346.8M), ranking the country 10th out of 46 in the Asia-Pacific region.

## Dogs, cats... and fish

According to Euromonitor data for 2025, 48.3% of Filipino households own a dog or cat – 40.8% are dog owners and 7.5% have cats. This has grown considerably in the past 4 years, from 11.9 million households in 2021 to 14.2 million in 2025.

The total pet population in the country in 2025 is estimated to be 68.1 million, up 15.1% since 2021. Fish represent the biggest number of pets (43.9 million), followed by dogs (21.3 million) and cats (2.74 million). Other pets kept – in much smaller numbers – are birds, small mammals and reptiles.

## Evolution of the pet food retail market in the Philippines (market share, in %)



Source: Euromonitor International | \*forecast based on Q1



## Shopping preferences

Sales of pet food in the Philippines are mainly through a range of retail channels, with just 10% via veterinary clinics. Euromonitor data indicates a gradual shift to online shopping between 2021 and 2025, with pet e-commerce increasing its market share by about a quarter (26.3%). But offline purchases still have 83.2% of the market.

Within grocery retail, small local stores are gaining in importance, especially among budget-conscious consumers. They provide affordable, repackaged products sold by weight, alleviating some of the recent price pressures, and now have a 15.6% market share, up from 13.6% in 2021.

## Tracking pet food imports

Data from the Philippine Statistics Authority shows that, in 2023, the country imported 176 million kg of dog and cat food worth \$200 million (€170M). According to Global Trade Tracker, dog and cat food imports in the Indo-Pacific region (40 countries) reached \$3.81 billion (€3.25B) in 2024. The Philippines

represented \$226.9 million (€193.5M), 6% of regional share, and it was the region's seventh-largest importer.

## Buying from overseas

In the period 2020-2024, the Philippines registered the highest annual growth rate in pet food imports (18.6% CAGR) of all the countries in the Indo-Pacific region. Interestingly, major economies in the region such as Indonesia (9.5%), South Korea (5.6%) and Japan (2.7%) have recorded lower growth in recent years.

The US currently holds a 26% share of the Philippine market for imported pet food, according to the International Trade Administration, a US Department of Commerce body. Other major exporters to the Philippines are Thailand (36%), the EU (15%), Australia (12%) and China (11%). The country's top suppliers of dog and cat food also include South Africa, Malaysia, Vietnam and Canada.

With the figures indicating consistent growth in consumers and imports, the Philippine pet market is a regional player to watch. ♦

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# From niche to mainstream: the Asian pet insurance market

Rising awareness, shifting attitudes and digital innovation are driving more pet parents in the region to consider insurance as an advisable purchase.



**Ismira Lutfia Tisnadibrata**  
Contributor  
PETS International

With pets increasingly considered family members, especially among the younger, urban generation in Asia, the continent has become a fast-growing market for pet insurance, even though penetration remains far below that of mature markets such as Europe and parts of Oceania.

## Opportunities and challenges

According to a survey conducted by research firm Exactitude Consultancy in late 2024, Asia-Pacific's pet insurance market is projected to grow by 18% in the next decade. Growth is likely to be propelled by economic development, rising pet adoption and more awareness of veterinary health, combined with improvements in healthcare infrastructure.

Anirudh Somani, Chief Product Officer at 360F, a Singapore-based technology firm that provides insurers and banks with AI-driven solutions, describes market progression as "an early S-curve" marked by

rapid awareness gains, heavy product experimentation and many first-time buyers. "It is protection against unpredictable vet bills and assurance of having access to advanced care. Emotional peace of mind is a strong motivator," Somani tells PETS International. He adds: "Asia is moving from, 'Should I insure my pet?' to 'Which health plan feels right for my pet?'"

According to him, the winners in Southeast Asia will be "those who go mobile-first, bundle real everyday value such as tele-vet services and pet wellness programs, partner with pet shop and pet care providers, and explain insurance coverage transparently".

The widespread use of smartphones in Asia makes insurance policy offers readily available in minutes. It also makes claims handling and processing faster through the utilization of apps.

***Indonesia's pet insurance sector holds promising prospects – with the right balance of public education, innovative product design and collaboration.***

***One of the challenges for pet insurers in the region is low insurance literacy in emerging markets.***

### Keeping tabs on uptake

Mature markets in the region include countries like Japan, where awareness of pet insurance is the highest and an established vet ecosystem is in place. China and Southeast Asia are showing signs of rapid growth.

The former because of its enormous pet base and its consumers' digital habits and the latter as a result of increasing vet service availability and awareness, despite the current low penetration.

One of the challenges for pet insurers across the region is low insurance literacy in emerging markets. There is also an uneven veterinary infrastructure, as well as price sensitivity for pet owners who live in less urbanized areas.

### Smaller urban markets

In Thailand and the Philippines, market growth is still concentrated in dense urban pet clusters. There are opportunities for insurers to forge more partnerships with vet clinics in the Thai cities Bangkok or Chiang Mai, and for combining tele-vet with select clinic networks to mitigate access gaps in Filipino cities such as Manila and Cebu.

There is a small but premium market in Singapore, where awareness of this type of insurance is also propelled by liability requirements for certain breeds that the country's Animal and Veterinary Service considers aggressive or potentially dangerous. A requirement like this is an exception in the region – pet insurance is still voluntary in other Southeast Asian countries.

### Changing Indonesian lifestyles

The cultural shift regarding pets is also evident in Indonesia. As pet ownership becomes part of the Indonesian lifestyle in this country of over 270 million people, which has a fast-growing middle class, it represents one of the largest potential markets in Asia. But pet insurance is still relatively new there, with a handful of insurers entering the market in the mid-2010s.

"As the middle class expands and disposable income rises, pet parents are willing to invest more in their pet's health and wellbeing. Pet insurance is seen as a natural extension of this trend, although pet parents' growing interest in insuring their pets is still in the early stages," says Budi Herawan, Chair of the Indonesian General Insurance Association (AAUI).

Herawan says the number of households with cats and dogs has been increasing steadily, showing signs of growth potential for the pet insurance market even though penetration is still very low compared to developed markets in the region. "Once awareness and accessibility improve, it could follow the path seen in other Asian markets," he adds.

While not yet fully developed, Indonesia's pet insurance sector holds promising prospects – with the right balance of public education, innovative product design and collaboration between insurers and veterinary providers. Coverage typically includes accidental death, medical expenses, theft and third-party liability.

### Growing awareness

AXA Insurance Indonesia launched its pet insurance nearly 10 years ago. It offers a comprehensive protection solution for pet owners, particularly dogs and cats, with official certification from the Indonesian Kennel Club PERKIN and the Indonesian Cat Association.

Edwin Sugianto, Director of AXA Insurance Indonesia, says: "We have seen a growing awareness among pet owners of the importance of medical protection and legal responsibility. Many have started looking for solutions for accidents or illnesses. This pet insurance product meets their need for security and certainty in dealing with unexpected risks."

He adds: "In Asia, countries such as Japan and South Korea have already widely adopted this product, proving that the need for financial protection for pets is not a temporary trend but part of a modern lifestyle."

AXA Insurance's pet insurance product has recorded more than 32 policies. This is a "positive first step" in building the current market, according to Sugianto.

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### Market indicators in Indonesia

AXA's strategic approach when it comes to pet insurance is based on several market indicators that point to the large potential in the country. These include the increasingly active dog and cat communities on social media and at offline events, as well as the rapid growth of veterinary clinics and pet shops in major cities.

"The main challenges in Indonesia are low insurance literacy and the absence of specific regulations on pet insurance. In addition, not all pets have official certification, which is one of the main requirements in our policy," explains Sugianto.

Pet insurance players are also looking to strengthen their collaboration with regulators in order that they increase the support given to pet protection.

### DTC pet insurance

Igloo first launched pet insurance in the region in 2022 in the Philippines, through Pet Insure for dogs, which is now available on the GCash app in partnership with Malayan Insurance. In October 2024, the company expanded its offering by adding pet insurance to its DTC platform in Indonesia.

Delta Andreansyah, Head of B2C Indonesia at Igloo, says the strategic rationale for investing in pet insurance is the rising trend of pet adoption and spending on pets. According to a Kantar survey in 2024, 94% of Filipino households own pets. This combination creates an untapped and under-penetrated market that can be served through digital distribution.

Andreansyah says: "Market potential is significant. Asia-Pacific pet insurance revenues are already estimated to be in the multi-billion-dollar range and forecast to grow at mid-teens CAGRs. According to Grand View Research, the pet insurance market in Asia-Pacific is projected to reach a revenue of \$9.7 billion (€8.3B) by 2030."

### Insuring pet travel in Hong Kong

Asia's young demographic is the main target group for pet insurance and it provides a niche segment for Prudential Hong Kong, which has introduced a pet protection scheme to add to its travel insurance offer.



A recent travel insurance survey commissioned by Prudential shows that pet owners want to ensure proper care for their pets as part of their travel plans. This is a key consideration, as the concept of pet-inclusive traveling is growing with the rise of pet-friendly communities.

In June, the company announced that it has added new features to cover trip cancellation or added expenses if the accompanying pet becomes ill or injured – a product benefit that it says is a first in the market. Pet parents can claim on their policy if the insured pet passes away or requires surgery or confinement at a licensed vet clinic or hospital.

As pet insurance evolves across the region, more targeted products such as these can be anticipated as part of a wider market expansion. ♦

A woman with dark hair, wearing a black t-shirt and blue jeans, is walking a beagle dog on a red leash. They are on a paved path in a park with many trees in the background. The woman is smiling and looking towards the camera. The dog is also looking towards the camera.

Country report: Vietnam and Cambodia

# Rising middle class drives pet boom in neighboring nations

**Increased ownership of cats and dogs in the big cities is boosting demand for premium food, accessories and services as well as for online shopping.**



**Marissa Carruthers**  
*Contributor*  
*PETS International*

Shifting cultural attitudes to pets, a greater understanding of their health and wellness, and more disposable income are the factors driving Cambodia and Vietnam's pet industries. Both markets show significant signs of growth and maturity, especially in urban hubs such as Phnom Penh and Ho Chi Minh City.

## Retail and services boom

Industry players in the region have seen a rise in the number of pet owners in recent years – especially among the younger generation. In Cambodia, with a population of 17.6 million, this trend is going hand in hand with an increased number of pet accessory stores and grooming businesses in the country's main cities.

"Just 10 years ago, there were only a couple of vets operating in Phnom Penh, and a handful of pet supply stores," says Yulia Khouri, founder and CEO of Animal Mama, a large shelter with multi-service veterinary

clinics in Phnom Penh and Siem Reap. "Today, you can find a groomer, pet shop or boarding kennel on pretty much every corner. There's been a huge boom."

## Urban dog parents

In Vietnam, a country with 101 million inhabitants, it is very much the same story as in Cambodia. According to TGM Research, awareness of health and quality – as well as an increase in pet parenting – are driving rapid market expansion.

Indochina Research has found that pet ownership is higher in urban areas, with about 25% of the residents of Ho Chi Minh City keeping pets and 18-19% in Hanoi and Da Nang. Interestingly, dogs are twice as popular as cats among urban respondents to a survey conducted at the end of last year.

## Growing appetite for better quality

Figures from Statista reveal that Cambodia's pet food industry is projected to hit \$25.8 million (€22M) by the end of 2025, with the market predicted to reach a CAGR of 10.1% between 2025 and 2030. Industry



experts say this highlights the vast opportunities for international and domestic expansion, with continued growth forecast for the future.

While Khouri believes there is an oversaturation of pet food products on the market, there has also been a change in pet owners' attitudes to food.

"People are now asking better questions than even 5 years ago, in terms of what do you feed your animal? We're slowly moving from feeding cats rice, for example, to realizing that they are obligate carnivores and need animal protein," she says.

"There are only a few brands that are made in Cambodia," says Pov Bun, Sales Manager at Royal Canin Cambodia. "About 5 years ago, most pet food products were imported from Thailand and Vietnam, but this wasn't good quality. Many owners also used to feed their pets rice, scraps of food or bones. Now they have a better understanding of animal health and are seeking higher-quality products."

***Cambodia's pet food industry is projected to hit \$25.8 million by the end of 2025, with the market predicted to reach a CAGR of 10.1% between 2025 and 2030.***

Bun attributes this shift to an increase in disposable income, heightened exposure to social media showcasing designer dogs and cats, as well as increased public awareness about pet care. As pet parents become better informed, demand for higher-quality products is changing the market.

### Natural and organic

In Vietnam, pet food market revenue is estimated to reach \$87.3 million (€74.5M) this year, growing annually at a CAGR of 7.8% through to 2030. It is expected to show a growth in volume of 5.2% in 2026. The country's rising number of pet owners are often looking for specialized food products that cater to specific health issues. This is predominantly driven by the younger generation.

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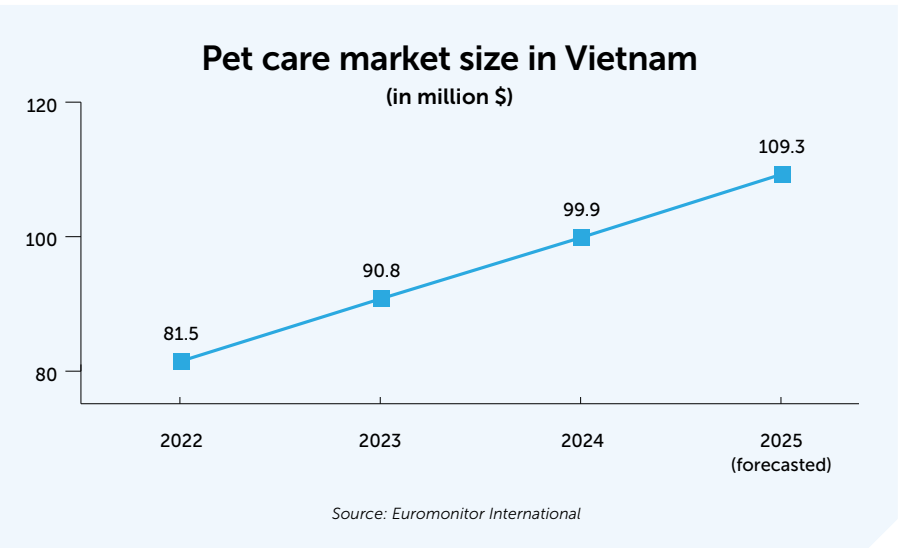
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Nguyen Thi Anh Phuc is Brand Strategy Team Leader at Fusion Group, a distributor of pet food and accessories based in Hanoi. “There is growing demand for premium food that has natural and organic ingredients. We’re also starting to see more pet owners wanting to feed their pets with human-standard food.” She says this has come with the rising awareness of pet health and care.

Highlighting the shift in demand, US pet food exports to Vietnam rose by about 60% between 2021 and 2024. However, China – with its lower production costs –

remains the dominant market supplier, with Chinese exports to Vietnam shooting up by 497% during the same period.

#### Pet care products peak

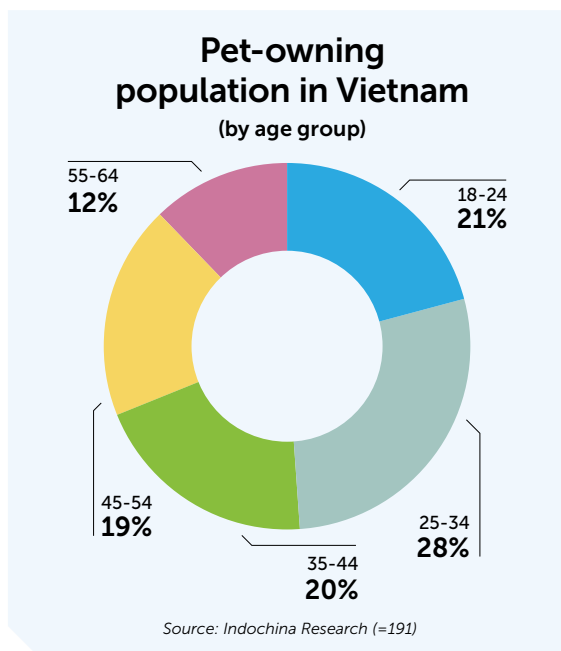
Cambodia’s pet care products market is also on the rise. According to 6Wresearch, the market size is forecast to reach a CAGR of 6.5% between 2025 and 2031. Meng Chou of Pet Store Cambodia has noted a surge in demand in recent years, not only for high-quality pet food, but also for grooming products and accessories.

“The number of dog and cat owners has grown in Cambodia in the last 5 years. We have noticed that middle-class youth in particular – often influenced by what they see on social media – want pet accessories such as outfits and toys,” she says, adding that hamsters and rabbits have become the pets of choice for young people.

#### Grooming and fashion

Khoury says that a major factor driving this shift in attitude derives from an increase in the humanization of pets in Cambodia. “Before, dogs and cats had to work. A cat was only useful if it caught mice and rats, and a dog was supposed to guard the house. More and more, we’re seeing pets being regarded as family members – and cared for as such,” she adds.

TGM Research findings show that the youth in Vietnam are also driving the growing trend of pet clothes and accessories, with 72% saying they buy these products.



"Owners are starting to take more notice of their pet's health and wellness. This has led to an increased interest in grooming services. Young people also want to personalize their pet's look, so are buying pet clothes and accessories for them," says Thi Anh Phuc.

### Online sales soaring

Cambodia is home to one of the youngest populations in Southeast Asia, with approximately 60% under the age of 35 as of April 2025, according to the UN. The country has 19.6 million internet subscriptions and 21.9 million mobile phone subscriptions, with the nation's e-commerce industry predicted to grow from \$1.1 billion (€0.9B) in 2024 to \$1.8 billion (€1.5B) by 2029, according to a report by Phnom Penh-based consultants Profitence.

It attributes this growth to a rise in young, tech-savvy people drawn to the convenience of online shopping. The increase in e-commerce platforms, such as Shopee and Lazada, as well as a surge in Facebook sellers and dedicated Cambodian-based online pet

stores, including Petzo, has contributed heavily to market expansion, according to Chou.

"The younger generation has a habit today of buying everything online. It's convenient, competitively priced and offers home delivery. This has also been helped by the expansion of digital payment systems in Cambodia, especially since COVID-19," she says.

In contrast, Vietnam has a much larger population and a higher average age of 32.5. As of February 2024, it had 80 million internet users and 127 million mobile connections. Its e-commerce industry is projected to reach \$27.7 billion (€23.6B) in 2025, growing to about \$44 billion (€37.5B) by 2027.

While online sales are showing definite signs of growth, making up about 30% of revenue share in 2025, pet shops and supermarkets remain the dominant choice. However, with online expected to account for more than half of the market share by 2029, e-commerce in Vietnam holds massive potential. ♦

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# Zooming in on key pet industry deals in 2025

**With notable activity across the sector, PETS International analyzes 50 investments that took place from January to September.**



**Thaís Matos**  
*Business News Reporter*  
*GlobalPETS*

Despite a macroeconomic environment affected by uncertainty, the imposition of US tariffs, geopolitical tensions and rising inflation, the pet market has seen positive movement in mergers and acquisitions (M&A) so far this year. Venture capital and private equity firms have remained active, and have strengthened negotiations alongside strategic acquisitions, both vertical and horizontal.

## Against the tide

The activity level goes against the general market trend, as the first half of the year was marked by a 9% drop in deal volume but a 15% increase in values, according to the PwC 2025 mid-year outlook.

Among the deals assessed by PETS International, only 4 had their values disclosed. Only 1 achieved \$1.5 billion (€1.3B), and the other 3 ranged from \$13 million (€11M) to \$62 million (€53M). The analysis shows a fragmented

scenario in terms of size, with a bigger presence of smaller transactions for geographic or portfolio expansion.

## Pet food fundamentals

The analysis concludes that almost half of the main M&A deals in the first 9 months of the year covered the pet food market, including nutrition and treats.

As many as 8 of them involved The Nutriment Company. This Sweden-based firm has acquired strategic and family-owned players in the UK, Germany, Spain and France, aiming to profit from the rising popularity of raw food and the growing cat population across Europe.

Garyth Stone, Managing Director in Houlihan Lokey's Consumer Group – a US-based investment bank and financial services company – attributes the force of the industry to its “strong” fundamentals. “That’s the main driver: increased spend per pet rather than increased number of pets,” he says in an interview with PETS International.

***Almost half of the main M&A deals in the first 9 months of the year covered the pet food market, including nutrition and treats.***

This market is heating up due to the changing behavior of pet parents and the arrival of a new generation that is more focused on high-quality pet food. "All of that is feeding into higher-quality, more expensive, higher-margin products," states Stone.

**Strengthening segments**

Fresh pet food is one of the areas with the most activity so far this year due to a combination of opportunity and caution. "The bigger companies can't quite predict how big the segment will become and they are trying to decide if it is worth it to invest. So we're seeing a lot more from an acquisition standpoint in that sense," says Andrea Binder, Pet Industry Thought Leader at market research firm NielsenIQ.

The next strongest segments are veterinary services and pet health, care and pharmaceuticals. Rising vet

ills have boosted the deals in this sector, leading to companies trying to offer more affordable services to struggling consumers.

According to Binder, there has been strong deal activity around some science-backed products, such as the supplements category – which is one of the few categories that is growing in store today. "We are seeing a lot of activity there, in manufacturers investing in those supplement companies rather than trying to go get all of the scientific research, which means so much more to the consumer these days," she comments.

Malmö-headquartered pet health brand Swedencare expanded in March with the acquisition of British player Summit Veterinary Pharmaceuticals for £30 million (\$39M/€36M). In another example, US home, pet and garden goods chain store Tractor Supply moved into the online pharmacy space by acquiring Allivet in January.

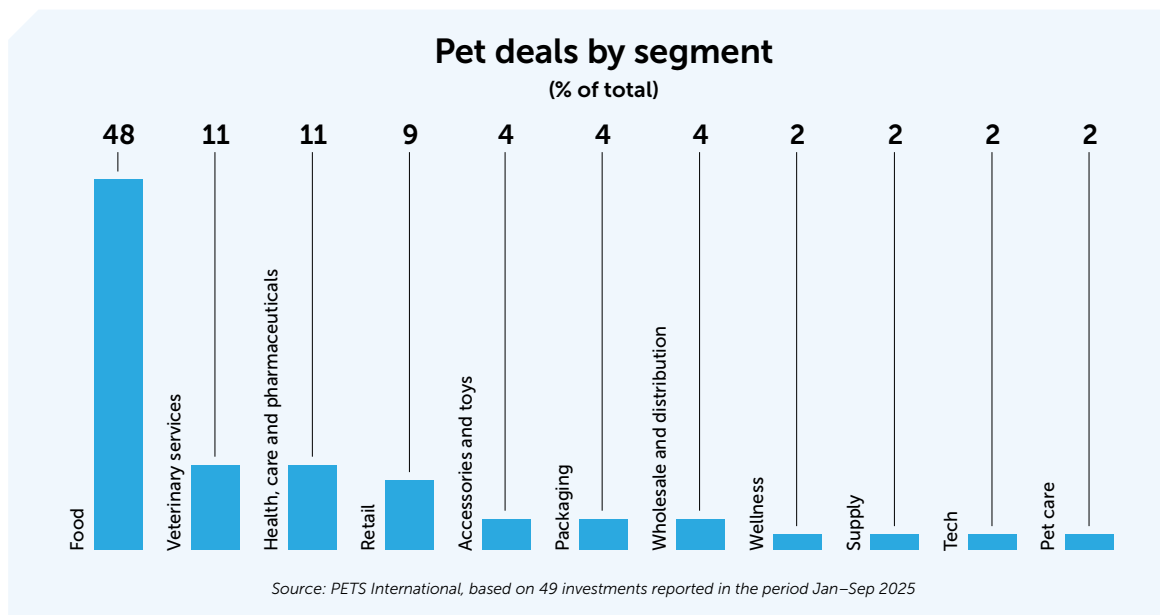
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A large, modern industrial building with a grey facade and blue accents, situated in a green field. The building has a large blue "K" logo and the word "KORMOTECH" on its side. In the background, there are industrial structures and a city skyline under a cloudy sky.

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### Focus on efficiency and scalability

Retail businesses, making up 9% of the total investments reviewed, are mainly linked to local distributors, with a focus on scalability and omnichannel strategy.

For Gilles Vanhouwe, Director at Brussels-based investment company Verlinvest, pet retail “continues to appeal to investors on a consolidation thesis”.

In January, for example, Bulgarian pet retailer Petmall announced a merger with its distributor, Petfoodtrade, to form a single entity to improve efficiency in the local pet market. Meanwhile, Dubai-based Pet Corner has expanded its regional presence with the acquisition of another pet retailer, Jungle Paws, based in Abu Dhabi.

Despite that, “many are waiting for a larger catalyst to unlock activity”, Vanhouwe explains. “Direct-to-consumer brands are maturing, with a handful like Katkin breaking into retail, while roll-up platforms such as Nutriment and AlphaPet are emerging as credible players.”

### Fewer deals in other areas

Other pet industry sectors witnessing deals this year include accessories and toys (4%), packaging (4%), and wholesale and distribution (4%), as well as wellness, supply, services and tech (2% each).

One of the highlights in the pet tech sector was the acquisition of Mars subsidiary Whistle by the GPS tracking and health monitoring platform Tractive.

According to Verlinvest’s Vanhouwe, besides the big sectors already explained, grooming, specialty retail, and pet pharma and wellness also stand out as “strong growth pockets”.

### Consolidation in Europe

With M&A transactions in Europe accounting for 67% of the major deals analyzed, there are signs of strong consolidation on the continent, mainly in the pet food and pet care sectors.

Stone from Houlihan Lokey’s Consumer Group highlights that M&A activity is characterized by waves. The premiumization trend – which dominated the American market and led to many interesting brand acquisitions in recent years – arrived to Europe somewhat later and took more time to grow and consolidate. “It’s only when companies get to a certain scale that they’re therefore relevant for M&A transactions,” he says.

North America accounts for the second-largest number of pet industry investments so far this year, with 17% of the analyzed deals distributed across the US. Extending beyond food to span wellness, veterinary, pharma,



*There has been strong deal activity around some science-backed products, such as supplements – one of the few categories that is growing in store today.*

accessories and tech, the American investment market indicates a focus on innovation, scale and specialization.

### Expansion and emerging markets

The Asia-Pacific region, accounting for 9% of the analyzed deals, is mainly focused on pet food and veterinary services. In the Middle East, Latin America and Africa, which each account for just 2% of the investments analyzed, businesses have mainly been acquired in the retail and pet food sectors.

Some of these moves were motivated by goals of geographic expansion. One example is the \$62 million (€53M) acquisition of Australian pet-sitting company Mad Paws by US player Rover in order to gain a foothold in the Australian and New Zealand markets.

Similarly, Nestlé's and Mars Veterinary Health's acquisitions of minority stakes in Indian companies Drools and Crown Vet, respectively, are ways for major international players to test new emerging markets.

### Investing in M&A for the future

The pet market is clearly still seen as having the potential to generate worthwhile returns. Most recent M&A developments have included investment group Eurazeo's completion of the sale of Ultra Premium Direct, France's leading DTC online pet food company, to UK pet food manufacturer Inspired Pet Nutrition.

Similarly, the American firm Central Garden & Pet has pointed to M&A as one of its strategies to recover from its net sales declines at the beginning of the year.

"The pipeline includes a handful of larger processes expected toward the end of 2025 and into early 2026. The outcome of these transactions, in both valuations and investor appetite, will help set the tone for the next cycle of M&A activity in the sector," concludes Vanhouwe. ♦



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## From treats to tech: trends in M&A activity across the pet business world

**Improved market conditions and renewed investor confidence are driving mergers and acquisitions in the pet space. What are the most sought-after segments?**



**Sam Farnfield**  
*Director*  
*PwC Strategy&*

Thanks to its resilience, the pet industry has long been an attractive sector for investors – and this has continued with great conviction into 2025. We take a closer look at the activity so far this year and consider which areas are attracting particular attention.

### Strong global rise in volume

Globally, the number of mergers and acquisitions (M&A) across the pet sector is projected to exceed 500 deals in 2025. This is a 41% increase from 2024. Europe, in particular, has been an epicenter for activity, with around 115 pet-sector deals in the first half of 2025, according to PitchBook. Of these, 61 deals were registered in the first quarter of the year and 54 in the second quarter.

The increasing deal volume reflects improving market conditions and renewed investor confidence, which is evident across sectors. However, it is important to point out that many of the pet deals so far this year have been

mid-market or bolt-on acquisitions. This is reflected in a lower average deal value (where disclosed). Nevertheless, high-quality assets have continued to command high multiples.

### Financial and strategic interest

Sustained interest in the pet sector continues from both financial and strategic investors. Strategic acquirers are seeking growth, capitalizing on synergies and filling any portfolio gaps via M&A. Meanwhile, private equity (PE) funds are both investing fresh capital into the pet sector and harvesting earlier investments.

Interest in the sector remains high among both investors who own (or have owned) pet businesses and those who are actively looking to enter the space. Just a few examples providing evidence of this are the Swiss-based PE firm Partners Group's acquisition of UK pet food manufacturer MPM Products, British international investment firm BC Partners' majority investment in supplement and treat brand PetLab Co., and the acquisition of Australian fresh dog food producer Prime100 by Colgate-Palmolive's Hill's Pet Nutrition.



### Investors' areas of focus

Pet food and treats hold the highest share of deal volume (approximately 70% of pet deals in recent years have been in food), but investor activity has also been buoyant in veterinary services, pet health and wellness (e.g. the UK's VetPartners' acquisition of Pet Chemist Online), and pet tech. This activity also extends across the value chain (e.g. German meat processor Westfleisch's entry into pet treats last year).

Moreover, as noted in other consumer sectors, some pet-related players are taking a proactive role in creating 'platforms' through roll-up – acquiring businesses and holding them in the same portfolio – for instance, The Nutriment Company in the UK.

### Health, wellness and nutrition

Based on market insights and recent pet deals, key themes can be identified that underpin many investors' decisions in the pet space. The hot segments and themes range from pet health and wellness to pet services, pet experiences and pet tech.

Reflecting the convergence of consumer sectors with adjacent areas (from health to tech and media), we expect a sustained focus on pet health and wellness (supplements, pet medications, diagnostic services and insurance). This is particularly relevant in the context of the COVID pandemic as the pets purchased during 2020-2021 are beginning to age.

Similarly, in line with human trends, we are seeing increased premiumization and personalization. Examples include meal plans, DNA or microbiome-based customization (e.g. dog health food brand Pooch & Mutt's acquisition of BIOME9, which produces dog gut health test kits), and functional nutrition focused on specific need states such as joint health and anxiety management.

### Pet tech is an attractive segment

Following the human obsession with data and analytics, we see the pet tech and data space as a hot area of interest for many investors going forward. The spectrum of businesses here is broad, ranging from smart feeders and automated litter boxes, to pet cameras, GPS trackers and data analytics on pet behavior.

***Globally, the number of M&A deals across the pet sector is projected to exceed 500 in 2025 – a 41% increase from 2024.***

Additionally, we expect to see increased interest – and growth – in pet services (e.g. grooming salons, daycare services, training franchises, pet travel services) and pet-friendly hospitality and leisure experiences (e.g. pet hotels, dog adventure parks).

Many of these segments are still very fragmented regionally and so remain ripe for consolidation, offering a range of value creation opportunities for investors.

### Other emerging themes

Investors in the pet space are spending time on a number of other themes and considerations, some of which cut across those outlined above. However, the themes and/or investment propositions are less well developed at this stage.

One example is environmental, social and governance (ESG) in the context of sustainability in pet nutrition, e.g. insect protein and cultured meat for pet food, or fully plant-based options. We expect these areas may drive some deal volume as these technologies mature and consumer acceptance increases.

### Positive outlook for the future

The M&A outlook is strong for the pet industry in Europe for 2026 and beyond. The conditions that have supported elevated levels of pet M&A in 2025 are expected to continue into next year: stabilizing interest rates, abundant PE capital and a strategic focus on acquisitions to support accelerated growth.

There is a buoyant pipeline to support continued investor activity that includes potential initial public offerings (IPOs), acquisitions by larger PE funds and corporate carve-outs or divestitures.

Market fundamentals in the pet space – crucially resilience – will likely remain relatively more attractive than many other consumer segments. While the past 5 years have taught us that we never know which 'black swan' may be around the corner, there is broad consensus that the volume and value of pet deals should continue to grow. ♦



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## Unique pet food platform: where innovation meets opportunity

**Fi Europe 2025 in Paris expands its Pet Food Suppliers Hub, bringing new ideas closer to commercial success.**

As the pet food industry prepares for Fi Europe 2025 in Paris this December, the event addresses a long-standing challenge: turning breakthrough ingredients into pet food products that successfully reach store shelves.

Fi Europe's Pet Food Suppliers Hub connects innovation across ingredients, packaging, processing and formulation with the decision-makers who can bring these solutions to market at scale. This approach addresses a clear gap in the market. The rapidly expanding European pet food sector, worth €29.3 billion (\$31.9B), has created demand for a dedicated commercial platform that serves product developers, procurement professionals and general managers driving strategic decisions in pet nutrition.

Fi Europe's Pet Food Suppliers Hub provides this European-based forum, designed specifically for the commercial professionals shaping the industry's future.

### The crossover advantage

Fi Europe sits at the crossroads of human and pet nutrition, creating opportunities for innovation to move in both directions. Novel ingredients often gain acceptance in human food first before appearing in pet

food. The reverse is also true. Ingredients with limited human acceptance, like insects, are established in pet food. This back-and-forth between the two sectors highlights the unique role Fi Europe plays.

This two-way pipeline became clear at the 2024 Fi Europe Innovation Awards. Cargill's TruPet™ postbiotic highlighted the growing trend in gut health across both human and pet nutrition, while Divaks' textured insect protein showcased sustainable protein innovation that is gaining acceptance in pet food faster than in human food.

The commercial potential of this crossover is significant. Western Europe leads global pet food innovation, accounting for 38% of new product launches. The postbiotic pet food market, as shown by Cargill's award-winning innovation, is projected to reach \$1.3 billion (€1.1B) by 2030. The insect-based protein sector, demonstrated by Divaks' textured solution, is expected to grow to \$11.5 billion (€9.9B) by 2033.

### Beyond the R&D department

What makes this crossover work is Fi Europe's distinctive visitor profile. Beyond technical specialists,

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the event attracts decision-makers across the commercial spectrum. In 2024, procurement and purchasing professionals made up 14% of visitors, general management 13% and distribution 11%.

With a global visitor base, Fi Europe is technical enough to showcase genuine innovation, yet commercial enough to reach the people who can put it into practice.

The commercial relevance is reflected in the companies attending. While dedicated pet food manufacturers such as Nestlé Purina, Mars Petcare, Royal Canin and Wellness visit regularly, major F&B companies exploring pet food opportunities, including Unilever, General Mills and Colgate-Palmolive, also attend. This reflects the crossover potential that Fi Europe facilitates.

### Building a complete pet food ecosystem

For 2025, Fi Europe is significantly expanding its offering for the pet industry. The Pet Food Suppliers Hub is growing its footprint and will host 30 exhibitors plus 15 product display pods. The main show floor already features hundreds of suppliers serving both the F&B and pet food industries, but the dedicated hub highlights the sector's rising importance.

The enhanced program includes dedicated Pet Food Innovation Days, a Networking Program on 3 December, and a Pet Food Spotlight on 4 December featuring curated content covering market data, consumer trends and regulatory updates.

This comprehensive approach shows that modern pet food innovation extends far beyond ingredients. It encompasses processing solutions that maintain nutritional integrity, packaging innovations that extend shelf life and improve convenience, and formulation expertise that balances multiple functional requirements.

### Market intelligence advantage

Last year, more than 450 exhibitors were active in pet food, from ingredients and additives to processing, packaging and consulting. This breadth enables comprehensive sourcing at the early stage of the supply chain, addressing commodity and high-volume considerations across all aspects of pet food development.

Beyond supplier connections, Fi Europe also delivers

market intelligence that informs strategic decision-making. The 2025 content program will cover sustainable ingredient sourcing, innovation in pet food packaging, novel proteins and consumer trend reports. These sessions highlight the commercial context vital for procurement, distribution and management.

Sustainability themes dominated discussions at Fi Europe 2024's content sessions, with strong interest from the pet food sector, indicating clear demand for knowledge and guidance on accelerating the industry's sustainable progress.

The supplier base is responding to this evolution as well. Dedicated pet food exhibitors have been slower to seize the opportunity, but the more generic suppliers are returning in strength. Many now recognize that pet food is no longer just a side business. For a growing number of companies, it has become a significant revenue stream worthy of dedicated attention and investment.

### The platform effect

The combination of crossover innovation, a broad commercial audience, a complete supplier ecosystem and strategic market intelligence creates what can be described as a platform effect. With Western Europe leading global pet food innovation and the industry's growing focus on health, sustainability and premium positioning, there is rising demand for platforms that can turn breakthroughs into market successes.

Fi Europe's comprehensive approach meets this need and creates the conditions where innovation can connect with the complete decision-making chain required for successful market implementation. In an industry where innovation drives differentiation and growth, Fi Europe's role as a bridge between breakthrough solutions and market reality stands out.

The combination of innovation showcase and access to the full decision-making chain is what turns laboratory breakthroughs into products that reach pet owners. This ability to transform concepts into commercial reality represents Fi Europe's core value proposition and explains why the platform is attracting growing attention from across the pet food industry's innovation and commercial communities. ♦

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*Dana Technology Aps*  
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The pet food industry is transforming quickly. Manufacturers face increasing pressure to deliver a wider range of products, from wet food to semi-moist treats and snacks. Traditionally, the solution has been to add extra production lines. However, this is not always the most effective answer. The smarter alternative is to build flexibility into a single, integrated system that can switch between wet and semi-moist production without the overhead of multiple dedicated lines.

## Running separate lines is costly

Most pet food manufacturers face the same challenge: operating separate production lines for different product types. The wet food line runs on one side of the plant, while treat or snack production takes place on the other. These are 2 independent operations that require full resources regardless of actual demand.

At the same time, wet food lines, often designed for larger capacity, may run only at medium output when producing both product types simultaneously, yet still need full staffing and ongoing maintenance. In today's competitive market, this inefficiency has a direct impact on profitability.

## A multi-purpose line is a smarter solution

Many processors may not realize that both wet chunks and semi-moist products can be processed on the same equipment with an extended steam cooking zone. Both undergo protein structuring and thermal

treatment, with the main difference being final moisture content.

A flexible system leverages this overlap, processing wet chunks through steam cooking or routing them through extended cooking to achieve 50-60% moisture for the semi-moist drying line. One line delivers 2 outputs, depending on demand.

This approach modernizes semi-moist production. Instead of traditional batch processing with tray handling and manual transfers, products flow continuously from forming through cooking to packaging. Semi-moist products from the DANA steam cooker can also be transferred into batch drying equipment if needed.

## The FlexLine advantage

DANA's Wet-Semi Moist FlexLine™ demonstrates this integrated approach in action. The same line seamlessly switches between producing wet products and semi-moist formats, before moving into the final drying stage where the desired moisture level is set according to customer specification.

The technical configuration optimizes both processes: a steam tunnel ensures precise thermal treatment, while the dedicated drying system controls airflow and temperature zones. Semi-moist products do not require sterilization, unlike chunks in gravy, which must pass through an autoclave, a step that adds significant cost. By consolidating 2 production capabilities into one flexible system, manufacturers can reduce CAPEX, optimize floor space and cut labor costs. This creates clear operational advantages. ♦



# Seeking out opportunities for wet pet food

If marketers sharpen their value proposition and innovate across health, convenience and feeding strategies, this category can hold – and even expand – its position.





**Shannon Landry**  
Pet Brand Manager  
Packaged Facts

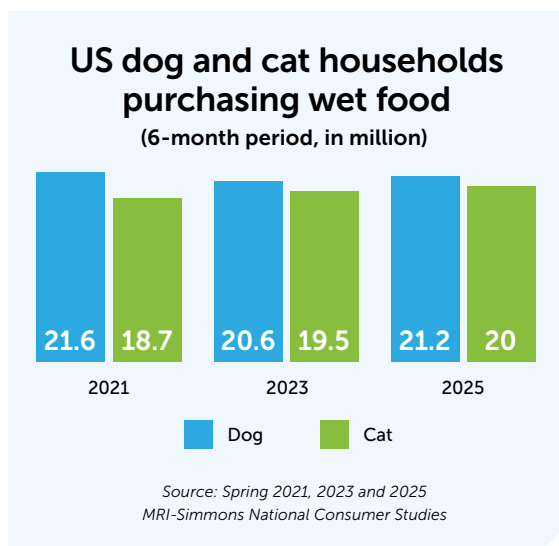
Wet pet food is facing a battle on multiple fronts. The rapid rise of fresh and refrigerated pet foods has reshaped how owners think about feeding their companion animals. At the same time, there's a shift in how they use this type of nutrition in their pet's feeding program.

### Repositioning to appeal

Wet pet food has traditionally been positioned as the moisture-rich, premium sibling to kibble. While pet parents are now drawn to the human-grade appeal of fresh, gently cooked foods – as well as the health and wellness benefits of functional, science-based formulations – opportunities do exist for the wet pet food industry to position itself along similar lines.

### Growth trajectory

Overall, wet pet food has held its place as the second most common formulation after dry food for decades. Wet dog food usage in the US has shifted in the past 5 years, dropping between market researcher MRI-Simmons' spring surveys of 2021 and 2023, and rebounding in 2025 to just under 39% of dog-owning households. Wet cat food has made steady gains during the same period, from 59% to nearly 61% of cat-owning households.



*There is a growing opportunity for wet food marketers in the cat space, where population shifts and pet owner attitudes have created an advantageous environment.*

From a number of households perspective, the picture is a little different, with the number of dog-owning households dropping between 2021 and 2025, while the number of cat-owning households increased. These shifts illustrate the growing opportunity for wet food marketers in the cat space, where both population shifts and pet owner attitudes have created an advantageous environment.

### Fresh hits the mainstream

In one of the biggest challenges to wet pet food, the use of fresh pet foods has grown significantly in the past decade, moving from the fringe to the mainstream. US brands such as The Farmer's Dog, Nom Nom and JustFoodForDogs have gained market share with direct-to-consumer models, while refrigerated food specialist Freshpet is now a mainstay in both pet specialty and mass-market stores.

The rise in popularity of fresh options has cast wet food's traditional premium status into question. Where wet food once offered clear superiority over dry kibble in moisture, palatability and meat content, fresh has now established itself as the super-premium winner.

### Science-based and therapeutic

The pet food industry is benefiting from a reinvigorated focus on super-premium, science-based and therapeutic diets and treats, which is not surprising given pet food's premier role in pet health and wellness. In Packaged Facts' January 2025 survey, pet food was cited as a most important pet health product by 80% of dog/cat owners, with 50% viewing pet treats in the same way.

Given pet food's position as the number one health and wellness product, it follows that pet foods with functional and condition-specific properties have grown in popularity over the past decade. The findings show that 23% of dog owners and 22% of cat owners use pet food formulations targeting specific health and wellness needs.

[▶ SEE NEXT PAGE](#)

This includes freeze-dried, air-dried and dehydrated formulations, which offer more ‘whole’ unprocessed ingredients than traditional kibble and wet foods.

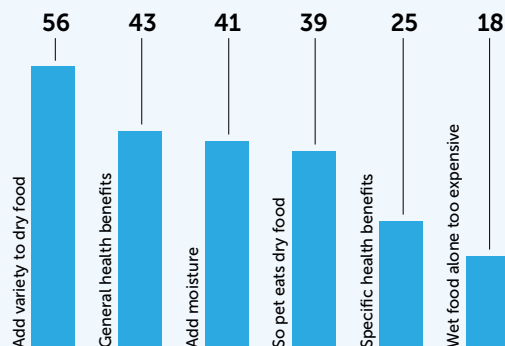
### Brand responses

As a way to benefit from fresh pet foods’ positioning tactics, marketers of shelf-stable products are now co-opting ‘gently cooked’ in their own marketing appeals and even product names. Putting the claim front and center, for example, Texan company Nulo’s Gently-Cooked Meals are billed as “a healthy, shelf-stable alternative to refrigerated or frozen foods, without the special storage or messy clean-up”.

Functional wet foods address pet owner interest in health and wellness products, not just providing condition-specific benefits but also adding value for cost-conscious consumers. Hip and joint, skin and coat, and probiotic/digestive health formulations are among the more popular targeted products pet owners are seeking.



**‘Why do you add other types of food to your pet’s kibble?’\***  
(in %)



Source: Packaged Facts June 2025 Survey of Pet Owners  
\*Multiple responses allowed

### Flexible feeding

For many pet owners, the cost of wet pet foods is prohibitive. In economically challenging times, not only do wet pet marketers need to be conscious of value-added propositions, such as gently cooked and functional formulations, they also need to provide consumers with financially feasible options.

Enter ‘flexible feeding’ – the use of alternative formulations to enhance a pet’s current diet. Packaged Facts’ survey results show that among the roughly two-thirds of pet owners who at least occasionally add something to their pet’s dry food, 69% choose wet pet foods.

Among these, 56% do so to add variety and interest to their pet’s kibble, 43% do so for overall health and wellness benefits, and 41% want to add hydration or moisture. A significant share (39%) add wet pet foods to ensure that their pet will eat the dry food.

This type of supplemental feeding holds considerable opportunity for wet pet food brands, allowing pet owners to continue to feed their pets the same diets, while using wet foods as an extra flavor or health boost.

### Redefining wet food’s value

Wet pet food is not in decline, but it is at a crossroads. In order to compete with fresh and functional offerings, brands must redefine wet food’s role in a pet’s diet. That means taking a number of steps.

First, they should make use of the freshness appeal, by embracing ‘gently cooked’ wholefood messaging – even in shelf-stable formats. They need to align with wellness trends through targeted functional benefits such as digestive health, joint support and hydration.

Promoting flexibility is also advisable – by positioning wet food as a valuable supplement to kibble that offers convenience, taste and health benefits without the need to commit to a full dietary overhaul.

Retailers and marketers who adopt these themes – while communicating value and versatility – will find that they can not only protect wet food’s relevance, but that they can even expand its market share in a competitive, health-conscious pet care ecosystem. ♦



# Exploring faba bean protein as a binder in wet pet food

New research demonstrates its potential to replace animal blood plasma while maintaining texture and palatability.



**Dr. Maygane Ronsmans**

*Product Manager Animal Nutrition  
BENEO GmbH  
beneo.com*

Demand for wet pet food is on the rise, with the segment's growth being driven by pet owners looking for premium and nutritionally balanced pet foods with good palatability.

Formulating high-quality wet diets isn't just about taste, it's about structure. Chunks need to hold, gravies must stay stable, and labels increasingly matter. For years, many producers have relied on spray-dried animal blood plasma (ABP) to deliver binding, gel strength and emulsification. That approach works but it can come at a high cost. And because it's animal-derived, ABP is increasingly perceived as undesirable by consumers.

With 2 in 3 pet owners considering plant-based proteins to be better for the environment, the use of plant-based alternatives to ABP is becoming more appealing.

## What the trials show

New technical trials conducted by Passion4Food, a specialist service provider for the pet food industry, reveal that BENEO's faba bean protein concentrate can be successfully used as an alternative to ABP in wet pet food.

The faba bean ingredient can be used for full or partial ABP replacement, with no significant change in the

end product's weight or texture, offering producers considerable cost savings compared to ABP. The results also show that faba bean offers better binding properties than pea protein concentrate when replacing ABP.

## Sustainability and nutrition

On top of offering technical and cost benefits when used in wet pet foods, BENEO's faba bean protein concentrate offers strong sustainability credentials related to the crop and BENEO's local sourcing and production process in Germany.

It's a highly digestible source of protein, suitable for a 'no grain' claim in pet food, plus its amino acid profile is relatively rich in lysine and can nicely complement cereal protein like rice protein or vital wheat gluten.

## The business case

As the technical trials show, BENEO's faba bean protein concentrate offers pet food manufacturers a win-win scenario.

They can decrease their recipe costs while benefiting from secure supply and meeting consumer expectations for more sustainable and plant-based pet foods, without impacting the quality of the end product.

## IP milestone

Following the positive trial results, BENEO filed an international patent application for its faba bean protein concentrate as an alternative to ABP in wet pet food, which was published in August 2025. ♦



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# Bring on the bugs: the case for insect protein

**Functional efficacy, clearly defined safety lines and rising consumer acceptance place insect-based pet food at the front of the alternative protein pack.**



**Karolina Hołda PhD**  
*Canine & Feline Nutritionist*

Pet owners across Europe are increasingly asking for 'bug diets', as pet nutrition incorporating insects moves from novelty to mainstream. With high protein digestibility, gut health benefits and sustainability credentials, such products have the potential for massive growth in the pet food sector over the next few years.

## The rise of insect protein

Since the late 1980s, poultry meal has been a staple animal protein in commercial pet food. The 2010s saw a sharp rise in plant concentrates such as pea and potato protein, driven by the grain-free and hypoallergenic boom. Pet nutrition is now heading for its next protein shift.

## More than muscle fuel

Recent work confirms that including black soldier fly (BSF, *Hermetia illucens*) or yellow mealworm (*Tenebrio molitor*) in pet diets can deliver roughly 90% apparent protein digestibility.

This is on par with premium poultry sources, according to research in adult dogs undertaken by researchers at

the Institute of Animal Nutrition at the University of Berlin, published in *Animal Feed Science and Technology* in 2020. It is also similar to precision-fed models, as shown by research published in 2025 in the *Journal of Animal Science* by researchers from the University of Illinois.

BSF oil contains about 60% medium-chain lauric acid. In vitro work at City University of Hong Kong, published in 2024 in *Animal Production Science*, showed that a 1% inclusion of oil extracted from bread-waste-reared larvae suppressed *E. coli* growth almost 10-fold. BSF oil also delivers roughly the same lauric acid punch as coconut oil, but without competing with human food supply.

## Gut health benefits

When chitin (the natural fiber that makes up an insect's shell) is partly converted into chitosan, it becomes a soluble prebiotic. A study from a team at the China Agricultural University, published in *Metabolites* in 2023, reported that including just 0.2% chitosan in cat food boosted the production of beneficial gut acids (butyrate) and helped tighten the gut lining.

Early clinical evidence, published in *Veterinary Sciences* in 2025 by researchers from Chiang Mai University, Thailand, also points to lower

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allergy risk. In a 4-week pilot study, 8 dogs with known adverse food reactions improved after their diets were switched from conventional meat to BSF protein.

Taken together, insects qualify as functional feed ingredients, a selling point that resonates with premium pet owners who want benefits they can see in their animals' coat, stool and skin.

### Drawing the safety lines

Novel inputs bring novel risks. The industry has moved fast to set guardrails that go beyond the 2024 IPIFF Guide on Good Hygiene Practices. There are 3 limits that dominate current research and Hazard Analysis and Critical Control Points (HACCP) audits:

#### Chitin load

When total chitin in the diet approaches 3% of dry matter (35–40% full-fat BSF meal), stools become noticeably softer and higher in moisture. Most manufacturers therefore cap BSF inclusion at 20% or use partially defatted meal.

#### Heavy metals

Cadmium tops the watchlist because larval uptake depends on the rearing substrate. A controlled study published in the mega-journal *PLOS One* in 2016 by researchers at Wageningen University in the Netherlands reported that larvae raised on low-cadmium fruit- and vegetable-based substrates accumulated markedly less cadmium than those raised on cereal byproducts. A European Food Safety Authority (EFSA) risk profile confirms that commercial BSF meals stay safely below the EU feed limit.

#### Thermal pasteurization

EFSA indicates that a brief heat step (around 90°C for a few minutes) is enough to bring bacterial counts below detection without harming protein quality. These limits reassure formulators that insect meal is as safe as established animal byproducts. But safety alone won't sway owners – they need to see a clear benefit.

***In a 4-week pilot study, 8 dogs with known adverse food reactions improved after their diets were switched from conventional meat to BSF protein.***

### Carbon considerations

Insects share the 'future protein' podium with mycoprotein, microalgae and cultivated meat. The carbon story, however, depends on where you draw the boundaries.

Using the same cradle to factory gate life-cycle assessment (LCA) method and an average EU electricity mix, a research team from the German Institute of Food Technologies published a study in the *Journal of Cleaner Production* in 2016 in which they calculated a BSF meal at around 6 kg CO<sub>2</sub> eq per kilogram of protein. This is roughly on par with an efficient European broiler chicken, at 6–8 kg.

When the LCA credits insects for recycling food waste or assumes renewable electricity, the BSF footprint falls to 2–4 kg, clearly beating poultry. Under those favorable assumptions, wind-powered mycoprotein still leads at around 3 kg and microalgae stay around 5 kg, while pilot scale cultivated chicken (small pre-commercial batches of lab-grown meat) remains over 25 kg.

### Cleared for take-off

Costs follow a similar pattern: BSF protein already sells for about €4 (\$4.72) per kilogram at 10,000 tonne output, while cultivated meat still comes in at roughly €20 (\$23.59) per kilogram.

Regulation tilts the field further. EU law already permits both BSF and mealworm meals in dog and cat food, while in the US only BSF meal and oil have an official Association of American Feed Control Officials (AAFCO) definition; mealworm dossiers are still under review.

Mycoprotein is likewise working through pet food petitions, and cultivated meat is approved for human use in just a few countries, and only in the UK so far commercially for pets. For now, insects (especially BSF) remain the only animal origin alternative that combines scale with broad regulatory clearance.

Price parity with poultry meal is the last milestone – and the learning curves suggest we could cross it well before 2030. The bug era, it seems, is no longer crawling; it is ready to fly. ♦



# The future of lab-grown meat

**As this novel protein source is introduced into pet food in the UK, what needs to happen for it to offer a realistic answer to the demand for sustainable and nutritious products?**



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

In February this year Meatly's Chick Bites, produced in collaboration with plant-based brand THE PACK, became world's first commercially available dog food made from lab-grown meat, after receiving regulatory authorization from the UK's Food Standards Agency (FSA) in 2024.

## Assessing the benefits

A review published in *Foods* journal in July 2025 from a research team based jointly at Kasetsart University, Bangkok and Washington State University looked at recent scientific publications, patent trends and market shifts relating to various alternative protein sources, including cell-based (lab-grown) sources. This comprehensive review sheds some light on both the potential benefits and the challenges ahead for lab-grown meat.

## Sustainability angle

Due to the rapid expansion of the pet food market, there is an ever-growing issue with the supply of meat.

In fact, the global pet food market accounts for around a fifth of meat consumption worldwide. In addition, pet owners are tending to spend more money on pet food, paying a premium for higher-quality ingredients, rather than the byproducts of human consumption.

Cultivated meat could reduce the pressure of this high and rising demand by eliminating farmed animals from the pet food industry – a fact that could also appeal to the growing numbers of vegans globally. It is too early to assess the true sustainability of lab-made meat, since its production has not yet reached industrial scale. Indeed, it is currently believed that the energy required to manufacture cultivated meat may well be higher than the energy required to produce beef. However, this may change as cultivated meat reaches a larger scale of production, with the use of renewable energy also offering a solution.

## Environmental impacts

An additional potential benefit of lab-grown meat is reduced environmental impact. Animal agriculture overall is a leading contributor to climate change, and pet food accounts for around 10-30% of the environmental impact of animal food systems. [▶ SEE NEXT PAGE](#)

According to an article published in *Companion Animal* in late 2024 by Davide Stefanutti, a consultant in veterinary nutrition, greenhouse gas emissions from lab-grown meat are predicted to be similar to, or slightly lower than, poultry emissions, 2 times lower than pork, and 11 times lower than beef.

The land required for production is also significantly lower at 42-63% less than for poultry, 65-67% less than for pork and 90-94% less than for beef. Lab-grown meat also produces no animal waste, which is a significant contributor to damaging water bodies.

### The lens of 'one health'

One health is the term used to describe a collaborative approach to achieving optimal health for people, animals and the environment. It recognizes that human, environmental and animal health are all closely linked.

Research from the University of Liverpool, UK, published in 2022 in the *Journal of Small Animal Practice*, found antimicrobial resistant *Escherichia coli* in 54% of raw-fed dogs' feces, and in the stools of 17% of non-raw fed dogs.

Using lab-grown meat decreases this risk of spreading food-borne pathogens, zoonotic diseases and drug-resistant bacteria, due to the aseptic conditions in the bioreactors that the cells are grown in. Furthermore, antibiotics are (on the whole) not required for production, with only tiny amounts of antibiotics used in the initial cell isolation, pre-production.

### Safety considerations

The sterile environment used to produce lab-grown meat minimizes the risk of contamination by pathogens or toxins. However, contamination is still possible after this phase of production. Lab-grown meat can reduce the risk of accumulation of contaminants such as antibiotics and heavy metals when compared with animal-meat products, due to production methods.

### Nutritional adequacy

There is the potential to optimize the micronutrient profile of lab-grown meat by incorporating different amino acids and fatty acids and adding important nutrients to the culture medium.

As yet no extensive nutritional data for lab-grown based pet food has been published; however, the US Food and Drug Administration (FDA) has published information on the expected composition of lab-grown meat, based on 2 lab-grown chicken products already approved for humans in the US. Cultivated meat is expected to have a very similar nutrient profile in terms of amino acid and fatty acid profiles to its counterpart animal-meat products.

Importantly, there is no publicly available information on taurine or arachidonic acid yet – both of which are essential nutrients for cats. Furthermore, being a novel ingredient, there is no evidence on the long-term effects of feeding lab-grown meat to pets. Further large-scale research is also needed on palatability, digestibility and bioavailability.

### Consumer acceptance

Many consumers are leaning towards more 'natural' diets, rejecting food from unnatural sources. Since pet owners are increasingly feeding their pets according to their own belief systems, this is a major potential barrier to acceptance.

A study from a research team at the Czech University of Life Sciences in Prague, published in the journal *Nutrients* in June 2023, aimed to determine what factors influenced willingness to include cultured meat in consumption (for themselves), based on age.

Gen Z (born mid 1990s to 2012) was significantly more likely than millennials (born early 1980s to early 2000s) to consider lab-grown meat healthier (due to the potential of adjusting the nutrient content). The older generation was also more concerned about the effect on human health. Ethical, ecological, and health and safety factors influenced the younger generation.

### Research-backed progress

Cultivated meat could offer a promising novel protein source for pet food, with potential environmental, public health and animal welfare benefits. However, more research is needed on long-term safety and nutritional quality. Furthermore, there are technical challenges to be met in order to produce industrial scale quantities of lab-grown meat at an affordable price for consumers. ♦





## Could cultivated pet food redefine the Asia-Pacific market?

**Future success will depend on science, regulation, consumer trust and manufacturers' ability to scale up cost-effectively.**



**Peter Yu**  
*Program Director*  
*APAC Society for Cellular Agriculture*

Customers in Asia-Pacific's booming pet industry are hungry for change. With owners seeking premium, sustainable and ethical options, cultivated protein is emerging as one of the most exciting alternatives to using conventionally produced meat in pet food.

### Seizing the opportunity

Today, only a small number of companies are fully dedicated to cultivated pet food. According to the Good Food Institute, an organization that promotes plant- and cell-based alternatives to animal products, nearly 300 companies are currently operating in the cultivated meat space. Of those, 46 are headquartered in the Asia-Pacific (APAC) region.

This niche is still in its early stages, but the growth potential is enormous. As a truly novel way of producing pet food, cultivated technologies create a unique opportunity to serve the entire pet spectrum, which extends far beyond cats and dogs to cover a wide range of animals with diverse nutritional needs.

APAC has the potential to play a central role, both as a major consumer market and as a manufacturing power hub. As the broader novel food sector gathers momentum, the next few years will be critical in identifying the most promising markets. The question now is simple: will cultivated pet food stay a niche curiosity or become the next big shift in how owners in the APAC region feed their pets?

The road ahead will be shaped not just by science, but also by regulation, consumer trust and whether companies can scale production to hit the right price point.

### Singapore at the forefront

As with cultivated meat for humans, cultivated pet food will most likely have to navigate stringent regulatory approvals. APAC countries including China, Japan, South Korea, Malaysia, Thailand and Singapore are actively engaging with this emerging sector, although each market is at a different stage of readiness.

In a regional first, Singapore's Animal and Veterinary Service (AVS) granted regulatory approval for a cultivated ingredient in pet food

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in June 2025. While the frameworks for cultivated pet food will often be similar to that of human food, there will most likely be some clear differences, such as is case in Singapore, where the Singapore Food Agency (SFA) regulates cultivated meat for humans.

For pet food, the AVS uses a different framework, which may account for differences in nutrition, production, labeling and licensing. For instance, pet food regulations emphasize crude fiber, whereas the human food framework measures dietary fiber.

Compared with other jurisdictions, industry players have found Singapore's process relatively clear and collaborative. This reinforces the city state's role as a leading testbed for cellular agriculture innovation across both human and pet foods, alongside rigorous evaluation.

### Regulatory readiness

Beyond Singapore, several other APAC countries are showing promising signs for the future of cultivated pet food. In Australia and New Zealand, recent regulatory clearances for cultivated meat for human consumption suggest these markets may soon follow suit for pet food. South Korea has a framework in place through the Ministry of Food and Drug Safety, while Japan is expected to release an updated regulatory framework by autumn 2025.

Malaysia is conducting an in-depth feasibility study for the cultivated meat industry as a stepping stone to regulatory development, and Thailand already has frameworks in place for human consumption.

Given these active developments, it is highly likely that much of the regulatory groundwork for human foods will extend to cultivated pet foods, making these markets particularly interesting to watch going forward.

### Pathways to commercialization

Other APAC countries are likely to start exploring cultivated pet food, but regulatory frameworks and clear guidelines are not yet widely available publicly. Many of them are still in the process of formulating pathways to commercialization. Therefore, companies interested in pursuing cultivated pet food are advised to actively engage directly with the relevant governing entity.

The good news for companies is that much of the regulatory groundwork for cultivated human foods can now support pet food applications, meaning approvals don't have to start from scratch. In many cases, authorities can adapt existing safety, production and quality frameworks rather than creating entirely new ones.

For example, while pet foods follow slightly different frameworks, these differences are relatively minute, making it comparably less difficult for regulators to assess this branch of food category.

As governments in Asia and elsewhere continue to streamline these processes, companies can expect fewer uncertainties and faster approvals, benefiting both innovators and the growing market for sustainable pet foods.

### Consumer acceptance

However, regulatory approval only opens the door. The factor that really decides whether cultivated pet food thrives is consumer acceptance.

Data specific to cultivated pet food in Asia-Pacific is scarce. From a human perspective, however, a 2023 survey by the APAC Society for Cellular Agriculture found that 90.4% of South Koreans would be open to trying cultivated meat or seafood products at least once. Notably, 18.9% expressed a preference for cultivated meat over plant-based alternatives.

Price, flavor, texture and nutritional value were identified as the top factors influencing purchase decisions, with over half (56.8%) willing to consume cultivated meat if it were cheaper than its conventional counterpart. The focus on nutritional value aligns with the growing demand for healthier and more sustainable pet food options in the region.

*In one study, only 32.5% of respondents indicated they would consume cultivated meat, yet 47.3% expressed willingness to feed it to their pets.*

### Receptive market for pet food

Interestingly, other studies have indicated that consumers are more inclined to feed cultivated meat to their pets than to eat it themselves. In a study published in mega-journal *PLOS One*, only 32.5% of respondents indicated they would consume cultivated meat personally, yet 47.3% expressed willingness to feed it to their pets.

Among those willing to eat cultivated meat, the majority (81.4%) were also open to feeding it to their pets. Conversely, even among those unwilling to consume cultivated meat themselves, 36.2% were still willing to feed it to their pets. These findings suggest that consumer attitudes towards the concept of 'cultivated' depends on the product type. There may be a greater appetite for cultivated pet food than for equivalent products for human consumption.

### Asia-Pacific's moment



Together, these insights imply a promising landscape for cultivated pet food in the APAC region. By focusing on targeted consumer education and market engagement to foster consumer acceptance and trust, and by ensuring products meet expectations related to price, taste and nutritional quality, companies have an opportunity to tap into a receptive market.

Moreover, companies that succeed in clearing regulatory hurdles and scaling production effectively will be well-positioned to capture significant first-mover advantages, setting the pace for the industry and shaping how cultivated pet food reaches the mainstream. If players in the APAC region seize this opportunity, cultivated meat could move from niche to a core part of how people feed the animals they love.

With these factors in place, the APAC region could become a leader in the adoption of cultivated pet foods, benefiting both pet owners and the broader goal of sustainable, innovative food solutions. ♦

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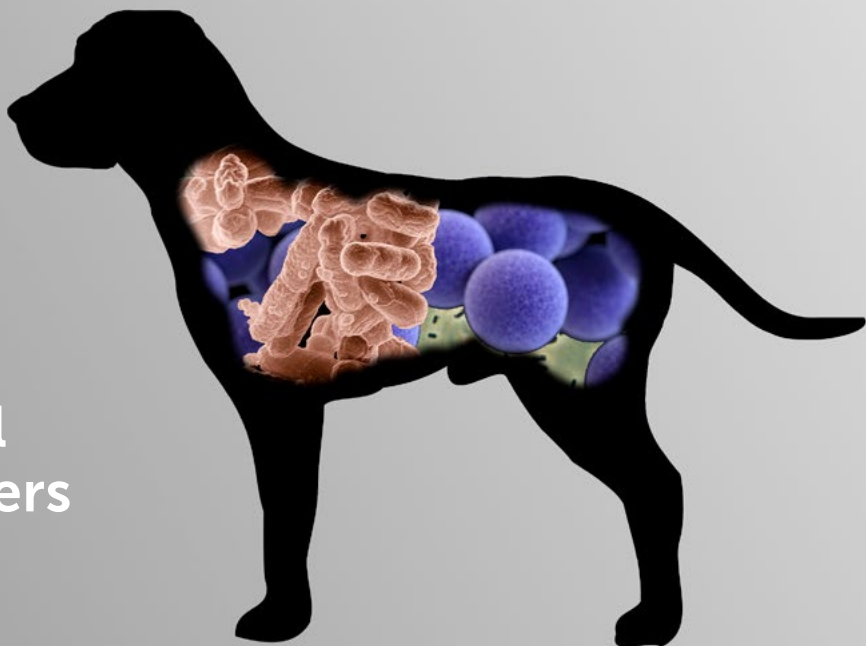


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## Why the intestinal microbiome matters in pet nutrition



### Could a community of microorganisms inside the gut hold the key to better nutrition for pets?

#### The intestinal microbiome and its composition

The intestinal microbiome refers to the community of microorganisms living in the intestinal tract of pets. It has multiple functions, such as fermenting nutrients and synthesizing substances that support both nutrition and intestinal transit.

Given its complexity and impact, it can be considered almost as another organ.

The composition of the intestinal microbiome is highly variable and depends on multiple factors. These include the host animal's species and age, environmental conditions, health status and contact with other pets, whether of the same or different species.

#### When the microbiome becomes unbalanced

Imbalances in the microbiome can cause significant health problems for pets. These range from intestinal issues such as diarrhea and bloating to nutritional deficiencies caused by reduced nutrient absorption. In severe cases, systemic complications may even lead to death.

Such imbalances can be caused by sudden dietary changes, stress factors including heat, cold or travel, veterinary treatments such as antibiotics, or exposure to unfamiliar pets.

The only lasting solution to problems caused by a microbiome imbalance is to restore the original balance or establish a new one, a process made difficult by the microbiome's diversity and complexity.

#### Nutritional support to restore balance

Eurofeed Technologies has developed 2 nutritional solutions designed to support and restore balance in the intestinal microbiome: Synerbyo Pet and Equipet.

##### Supporting intestinal balance

Synerbyo Pet combines thermally activated and modulated dietary fiber, providing a substrate that promotes the development of beneficial intestinal microflora.

It also contains yeast products that support intestinal health and regular

transit, along with easily absorbable trace elements that aid recovery. By helping to rebalance the microbiome, Synerbyo Pet can be used at all life stages.

##### Promoting intestinal integrity

Equipet is formulated with active ingredients including butyric acid glycerides, enabling pets to reach optimal butyric acid concentrations in the intestinal tract.

This supports the maintenance and restoration of intestinal health and integrity.

Equipet can be used at any life stage, but is particularly valuable for young pets as they develop their microbiome. It is also recommended for pregnant and nursing mothers, supporting the transfer of a diverse and functional maternal microbiome to offspring. ♦

**Eurofeed Technologies S.p.A.**

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# The rise of treats and chews drives pet oral care

With widespread dental diseases and growing awareness, the category is opening significant business opportunities worldwide.



**Nuala McHugh**  
*Contributor*  
*PETS International*

With 80% of dogs showing signs of dental disease by the age of 3 and awareness of feline oral health rising, consumers are looking for solutions that deliver results without daily brushing. This has opened the door to one of the fastest-growing categories in pet care.

## Pitching preventive care

Valued at \$1.29 billion (€1.1B) in 2024, the global market for dental treats is forecast to almost double to \$2.45 billion (€2.09B) by 2033, expanding by 7.6% annually. Dog treats account for the largest share, representing approximately 70% of the market in 2023. However, the most rapidly growing segment is dental treats for cats.

Functional dental treats are formulated to reduce plaque and tartar, combining mechanical abrasion with active ingredients such as enzymes, zinc or sodium hexametaphosphate. In the US, products must demonstrate at least a 20% reduction to carry the Veterinary Oral Health Council (VOHC) seal.

## Certified brands recommended

"Dental treats are not the gold standard for oral health, but can be a useful additional tool, particularly for pets that don't allow their owner to brush their teeth," says Dr Jamie Whittenburg, Veterinarian Director of online guide Senior Tail Waggers and Director of Kingsgate Animal Hospital in Texas.

"As a vet, I only recommend certified brands," she says. "That recognition helps ensure a product is effective at managing dental disease. Clients in my practice are mostly interested in products that are proven effective and easy to administer." She adds that many of them ask about natural ingredients.

## Popular sub-segments

As wellness spending rises, demand for specialized oral care items is accelerating. Natural formulations, functional active ingredients and product certification all add value for today's pet parent.

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***Natural formulations, functional active ingredients and product certification all add value for today's pet parent.***



According to Verified Market Reports (VMR), gluten-free dental treats dominated the global market in 2023, with a 60% share.

Personalization is also inspiring innovation. Softer chews for cats and small dog breeds address long-underserved segments, while tougher textures meet the needs of large dogs requiring stronger abrasion. Cat dental care, in particular, is emerging as a growth frontier.

### Educating pet parents

Vets have been educating pet parents about the importance of oral health for many years. “Effective dental chews can be an excellent additional therapy – one pets can enjoy. Many of my clients use chews as a reward after their daily toothbrushing session,” says Bob Partridge, recognized specialist in veterinary dentistry.

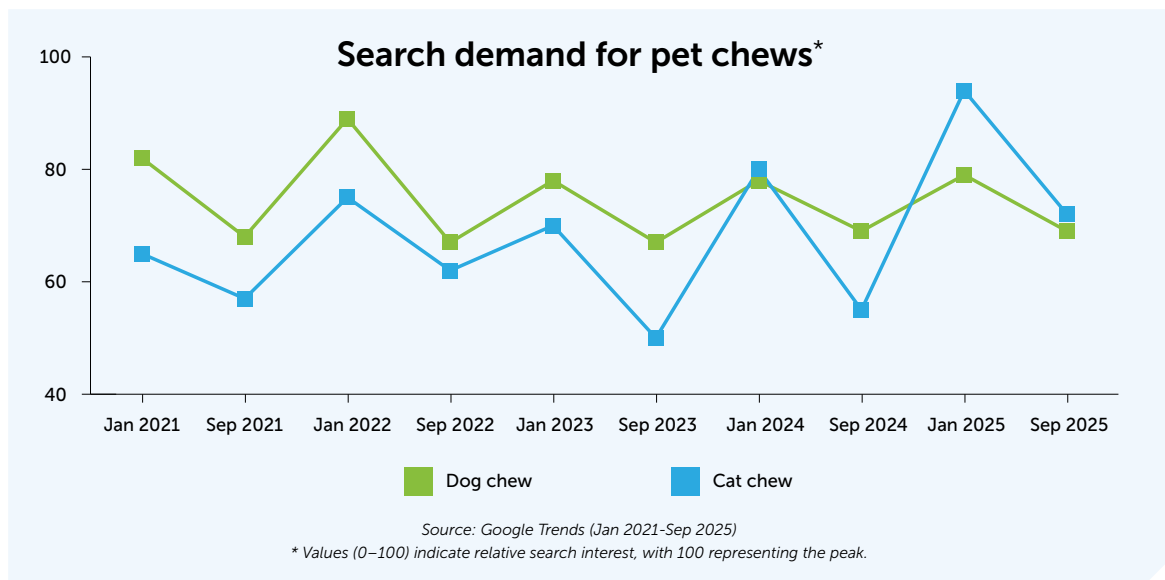
“Dental chews can be great for oral hygiene – helping to clean the teeth. However, they can also be damaging if a dog bites down too hard on them. As a guide to my clients, I say if you can indent a chew with your thumb nail, it is probably soft enough to give,” he explains.

### Regional growth patterns

VMR data for 2023 shows that North America holds the largest share of the global dental treats market, accounting for 40% of revenue. Asia-Pacific follows with 25%, then Europe (20%), Latin America (8%) and the Middle East and Africa (7%).

According to Grand View Research (GVR) market analysis, Europe accounted for 29.8% of the global dog dental chews market in 2024 in terms of revenue. GVR expects the European dog dental chew segment to surpass \$180 million (€153.5M) by 2030, fueled by vet-endorsed, science-backed formulations.

North America is projected to lead the regional market for chews in 2030, but Asia-Pacific is currently the fastest-growing market in this segment. In terms of sub-segments, dental bones were the largest revenue-generating product in 2024 and are expected to register the most growth in the future. In East Asia, feline-focused products are expanding quickly, particularly in Japan and South Korea, where aging cats and small pets dominate.





## Channels and compliance tools

Distribution strategies are evolving alongside product innovation. According to point-of-sale solution eTailPet, the online pet category has nearly quadrupled since 2013. Greenies subscription packs and Virbac veterinary bundles are designed to lock in compliance and repeat sales. Veterinary channels remain central for credibility, while grocery and specialty retailers drive mainstream adoption.

Mars Petcare has made oral care a strategic focus, leveraging its brands and digital platforms to help owners integrate dental wellness into everyday routines. By positioning oral care as a daily habit rather than an occasional add-on, Mars is signaling the long-term direction of the category.

## Brand and retailer opportunities

For manufacturers and retailers, convenience and compliance are driving new growth areas. Functional dental treats sit at the intersection of health and consumer expectation, so products that deliver

measurable benefits with minimal owner effort are primed for long-term demand.

Cats remain underserved and represent a key white space in the market, while certification and clinical claims are critical trust signals. Retail bundling and subscriptions can also offer additional routes to pet owner loyalty and recurring revenue.

“Brands should position their products to busy owners, by acknowledging that brushing is best but it’s also OK to use dental treats daily as part of a realistic care routine,” says Anastasia Waugh, canine dental health expert and owner of The Dog Tooth Fairy in the UK.

## Looking ahead

With brushing compliance still low and dental disease widespread, functional dental treats are becoming embedded in daily care. For the industry, this is not just a trend but a category transformation – turning a longstanding challenge into one of the most dynamic growth opportunities in pet health. ♦

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# Flea and tick protection: attitudes of pet parents around the world

From applying spot-on treatments to administering chewables, new data shows how pest prevention habits differ by country across Europe and the Americas.



Dan O'Connor  
Contributor  
*PETS International*



The majority of pet owners around the world buy products aimed at stopping biting insects from affecting their cats and dogs, but where they make their purchases, what kinds of products they use and when they apply them varies. The findings of a survey published earlier this year by Yummypets, powered by Loop, provides some useful insights.

### Purchasing frequency

The survey was conducted among 2,926 pet owners in 6 countries: Brazil (734), Canada (340), France (460), Mexico (530), the UK (360) and the US (502). France was the only country where a majority of the sample was made up of cat owners (61%). In the other 5 countries, two-thirds of the respondents were dog owners.

The frequency with which pet owners treat their pets with protective flea and tick products varies. Brazil has the highest usage rate of the countries surveyed, with 90% having bought a product within the last 12 months. France is just behind that, with 88% saying they made

***Some 61% of US dog owners who buy a pest protection product use it on their pet monthly. The same is true for 44% of US cat owners.***

a purchase in the past year. For Mexico this was 84%, while pet parents in the US and UK reported 72% and Canadians just 56%.

At first glance, this suggests a strong market for this industry segment in Latin America and France, with softer demand in anglophone countries. However, in the US, UK and Canada, those pets who do receive flea and tick prevention tend to be given it more frequently.

### Monthly use or less

Some 61% of US dog owners who buy a product use it on their pet monthly. The same is true for 44% of US cat owners. In Canada, 53% of dogs and 30% of cats get their treatment once a month, and in the UK, 54% of dog owners and 53% of cat owners give treatments monthly.

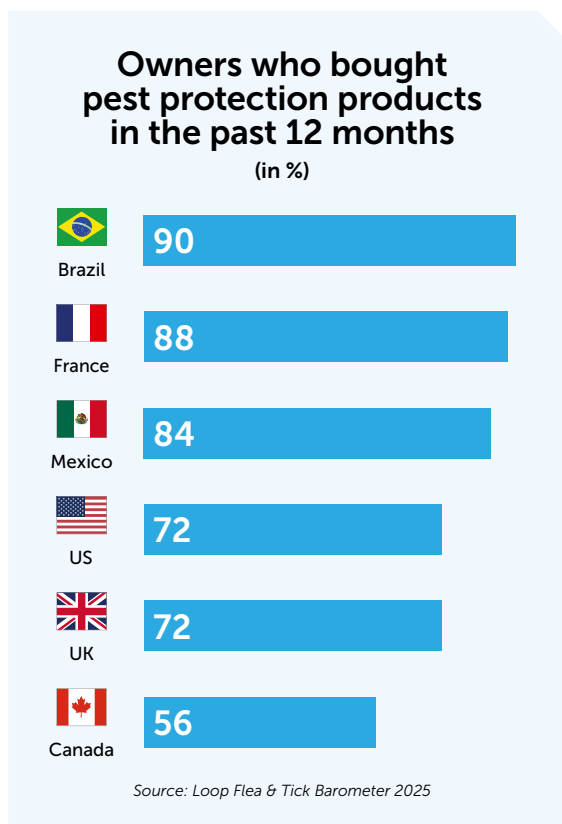
Non-English-speaking countries seem to treat their pets less often. In France, just 24% of dog owners and 23% of cat owners do this monthly. Latin American countries have strong purchasing frequency rates, but lower use frequency rates. In Brazil, 17% of dog owners and 15% of cat owners use treatments monthly, while in Mexico this figure is 11% of dog owners and 9% of cat owners, with most pets receiving treatment 1-3 times a year.

### Comparing retail channels

Yummypets also asked pet owners where they buy their flea and tick treatments. The findings reveal that the US is the only country where online shopping comes out on top, although this channel is also popular in the UK and Brazil.

The second most popular place to buy pest protection is a vet clinic, with this the preferred option in Canada and Mexico, particularly among Mexican dog owners. Pet retailers come in third. They are the first choice for Brazilian pet parents, but the least popular in France where many consumers buy these kinds of products at pharmacies.

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### Favored types of protection

The types of products used varies widely, but spot-on treatments are the most popular in every country surveyed. The second most used treatment is the pill form, which is particularly popular in France (58% of pet owners) and Brazil (49%).

The use of collars and shampoos is also widespread, with the latter relatively popular among Mexicans (44%) and Brazilians (40%), but not often chosen in France (9%).

In the US and Brazil, chews are very popular, among 37% and 41% of pet owners respectively. Dog-owning US respondents are particularly heavy users of chewable treatments (55%). This form of prevention is yet to make major inroads in the UK (9%) or France (3%).

### Ease of administration

Across the board, pet owners say they find it quite easy to administer their chosen pest protection treatment, though in general people have an easier time treating their dogs than their cats.

Pet parents in France, where pill use is high, have the most trouble with their dogs, while owners in the UK often have problems with their cats. ♦

### Types of pest protection products purchased\* (in %)



Source: Loop Flea & Tick Barometer 2025  
\*Multiple responses allowed

# Proactive quality optimization: smarter fresh meat use in pet food production

How can pet food manufacturers manage fresh meat variability to improve both efficiency and competitiveness?



**Raven Brackx**  
Product Manager  
BESTMIX Software  
bestmix.com

## Hurdles in fresh meat utilization

Working with fresh meat means consistently balancing product quality while minimizing ingredient spoilage. Meat is inherently variable, with significant differences in quality and fat-to-protein ratios. Since end-product consistency depends on what goes in, manufacturers often pay premium prices for raw materials that meet tight specifications, batch after batch.

Managing the shelf life of premium meats is equally crucial. To prevent spoilage before use, manufacturers rely on methods such as First In, First Out (FIFO) or First Expired, First Out (FEFO). These approaches reduce waste but limit flexibility, as batches are consumed in strict order without considering how one batch might perform better than another.

## Hidden risks in standard practices

The common assumption is that if suppliers meet specifications, blending according to FIFO or FEFO will naturally smooth out variability. By treating end-product consistency and shelf-life management as separate concerns, many producers overlook a deeper issue: the failure to optimize both nutritional quality and freshness at the same time.

Raw material quality fluctuates even when suppliers claim otherwise. Manufacturers may pay premiums for "stable" specifications without verifying consistency.

When those assumptions fail, the result is often product inconsistency, costly rework and wasted batches. Paying premium prices reduces margins without eliminating variability, while narrow tolerance limits create vulnerability to supply chain disruption.

## Smarter approach

Rethinking raw material utilization means ensuring every batch is used at its highest potential before expiration. By going beyond supplier certificates and assessing actual nutritional composition, producers can make smarter blending and batching decisions. Factoring in both quality and shelf life allows each batch to be used fully, reducing waste while tolerating greater variability. This lessens dependence on costly supplier premiums.

This represents a shift from reactive quality management to proactive quality optimization. It requires re-evaluating traditional practices and recognizing that narrow tolerance limits are not always sustainable. Integrating real-time batch quality data into production planning enables smarter use of variable raw materials, increasing resilience and efficiency. Although this approach requires operational adjustments, it is already gaining traction in parts of the world, particularly in the United States.

## The future of efficiency

Efficiency gains today are no longer found solely in faster production lines or larger capacities. They also lie in how intelligently raw materials are evaluated and utilized before processing begins. To learn more about optimizing meat blending, producers can look to BESTMIX as a partner in gaining a competitive edge. ♦



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# How can manufacturing facility projects better meet deadlines?

A recent survey indicates that **1 in 3 manufacturers now miss their target date when launching a new product or expanding production.**



**Emma Penrod**  
*Contributor*  
*PETS International*

'Move fast and break things' might be a tech industry motto, but speed matters to any company looking to launch innovative products and capture market share in new and emerging categories – from software and seltzers to raw and clean-label pet food.

## Obstacles to delivering on time

Yet in spite of this need for speed for companies looking to win market share, 1 in 3 manufacturers miss more than half their deadlines on projects such as production line retrofits and expansions, according to a survey of 396 US manufacturers conducted this spring by CRB, a global provider of sustainable engineering, architecture, construction and consulting solutions.

Although the survey was a first for CRB, Director of Client Engagement Ken VonderHaar suspects the situation is getting worse. A growing number of obstacles, such as inflation and lingering supply chain disruptions, mean companies are more likely to miss their deadlines than in the past.

"We do believe that it is now more challenging to meet in-service dates and to meet ramp-up volumes," says VonderHaar. "There is a lot of pressure on the project

team to deliver for lower cost, in less time and to promise a higher yield the first year, because you won't get your project funded if you don't."

## Planning ahead is vital

As with any deadline-driven project, planning ahead is key to success. But Drew Blank, Vice President of Product Management at engineering and building design company WEBBER/SMITH, says many of the corporate projects he's seen miss production deadlines simply didn't allocate enough time to the production line overhaul in the first place.

"Usually, for a renovation, expansion or new build, we would recommend a much longer timeframe," Blank explains, adding that he would expect line process upgrades to take at least a year. Larger-scale renovations on existing facilities could span 2 or more years.

## Finding workarounds

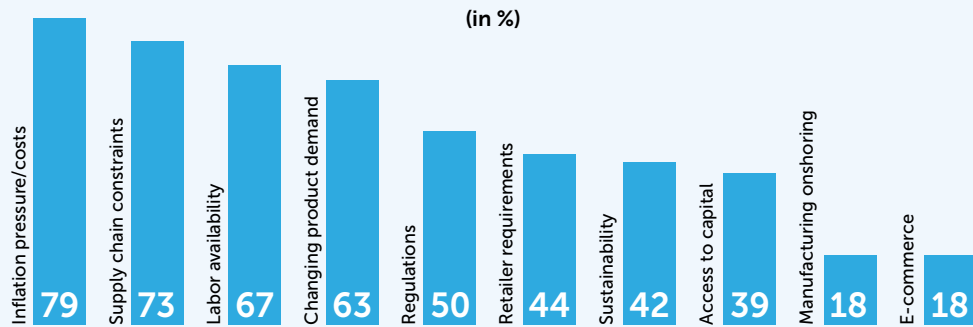
In his experience, companies set short deadlines for retrofit projects because company leaders want to cut costs and avoid downtime. But labor shortages and lingering supply chain disruptions can prevent manufacturers from realizing those deadlines.

Transformers and electrical switches may require up to 52 weeks of lead time, Blank says, and this leads to potential delays when equipment isn't ordered sufficiently early.

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## Challenges companies face in meeting deadlines\*



Source: CRB 2025 Horizons: Operational Readiness Report

\*Data based on respondents' top 5

But VonderHaar says that there are some potentially creative workarounds. He has seen clients manage to keep projects on tight schedules by buying back-ordered equipment on eBay or even by 3D printing the parts and equipment that are needed.

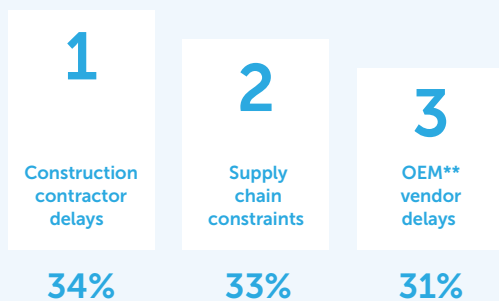
### Budgetary constraints

WEBBER/SMITH works for companies in the food and beverage industry, including pet food manufacturers. Budgets have become another major sticking point for many of its clients. Costs have not returned to their pre-pandemic norms, and companies that haven't upgraded their processes or equipment since 2019 often find that their money doesn't go as far as they might expect.

Projects can fall behind when clients decide to redesign or scale back after receiving the first round of estimates and being shocked by the price, Blank explains. So researching current costs upfront can keep projects on schedule. VonderHaar agrees: "A \$10 million (€8.5M) project in 2019 could be a \$20 million (€17M) project today."

Companies with tight budgets and timelines might consider what they can do without major renovations, Blank says. For example, a pet food company that wants to move to human-grade processes could meet food safety standards with their existing facilities by simply retooling their procedures. Workers can be directed to avoid moving raw ingredients into an area with finished products, and standing water could be mopped up instead of installing drains and sloped floors.

### Top 3 causes of commissioning delays\*



Source: CRB 2025 Horizons: Operational Readiness Report

\*Data based on respondents' top 3 | \*\*Original equipment manufacturer

### Automation and AI

As with many industries, CRB has turned to automation and artificial intelligence to streamline and reduce time spent in the planning and design phases of a project. But, in many cases, VonderHaar says that automation has also become something of a project bottleneck. "Automation was a wonderful thing 20 to 30 years ago... and honestly we didn't think, gee, someday they're not going to make those anymore," he says.

Ideally, companies would regularly remove and replace obsolete equipment. But, in reality, many have just kicked that can down the road, according to

VonderHaar. That means a substantial number of CRB's clients face a "deep hole" of outdated equipment that is difficult to replace. And this backlog may delay new projects when it becomes apparent that the automation on a new line won't be able to communicate with existing systems.

### Processes but also people

While there is ample opportunity for issues with supplies or construction to delay a project, the main reasons companies miss production deadlines relate to employee training, according to CRB. VonderHaar says: "If I have to buy new equipment, I'm going to spend a lot of time making sure it is made right, installed right, and utilities are run to it. I'm really going to focus on that machine. Most owners are pretty good at that."

He has found that companies often miss their production deadlines – or fail to hit early production quotas – because they neglect the human elements of a facilities redesign. A machine might clog soon after a new line opens because the materials fed into it were out of spec. Or simply because the operators and

*Companies often miss their production deadlines because they neglect the human elements of a redesign.*

maintenance teams don't know how to address the clog when it happens.

### Early employee training is key

Beginning employee training earlier in the process could help address this. And not just for employees who work the new line directly. Adding or renovating a production line also means updating maintenance teams on which parts they need to stock, quality control teams on the testing equipment they need, and so on, VonderHaar says.

Yet, according to CRB's 2025 survey, just 51% of companies start thinking about things like employee training or updated operating procedures in the early stages of renovation or expansion. "What we're seeing is that it's not being done adequately," VonderHaar says, "and the results are showing up as a delayed startup or extended ramp-up curve." ♦

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# Rising costs pile pressure on US pet owners

**The consequences of ever-increasing pet care expenses are potentially significant, with some families having to ask themselves if they can still afford their furry friend.**



**Mary Acklin**  
*Senior Director of Communications*  
*CivicScience*

The bond between people and their pets in the US has never been stronger, but survey results suggest that the expenditure involved is forcing more than half of owners to make difficult decisions about their pet's care that could have an impact on the wider industry.

## Financial reality check

Consumer analytics platform CivicScience has conducted research among more than 1,900 pet owners and the findings paint a stark picture of economic strain in households across the US. While 46% of pet owners say they haven't yet made changes due to cost concerns, the majority – 54% – have

already been forced to modify their pet care routines, purchases or living situations due to financial pressures.

The most common cost-cutting measures are where pet owners feel they have flexibility. Examples of this are the 1 in 5 pet owners (21%) who have skipped or delayed veterinary visits, while almost the same number (20%) have switched to less expensive pet food brands.

Other significant adjustments include delaying or avoiding getting new pets (16%), canceling pet insurance (15%) and reducing grooming frequency (15%). Additionally, nearly 1 in 10 pet owners (9%) have been forced to rehome a pet due to cost considerations. This decision represents not just personal suffering but is also a broader indication of the financial stress facing US households.

### Where money is going

Pet spending patterns reveal both the priorities of the owners and the areas most vulnerable to economic pressure. Unsurprisingly, food and treats remain the non-negotiable category, with regular spending on this.

That reflects both the essential nature of nutrition and the consumer's unwillingness to compromise on their pet's basic needs.

Although over the past 2 years affordability has become an increasingly important factor when buying food, US pet owners are now – as of the first quarter of 2025 – almost equally focused on quality (21%) as on price (21%). This represents a fundamental shift in the market dynamic.

### Low take-up of insurance

Almost half of all pet owners still regularly spend money on veterinary care and toys or accessories, while 29% regularly spend on grooming services. Notably, pet insurance adoption remains low, [▶ SEE NEXT PAGE](#)

### How owners have adjusted pet care for cost reasons\*

(in %)

46

No changes made

21

Skipped or delayed a vet visit

16

Delayed or avoided getting a new pet

15

Reduced frequency of grooming

15

Canceled pet insurance

9

Rehomed a pet due to cost

Source: CivicScience

\*Multiple responses allowed

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at just 15%, suggesting either cost barriers or a lack of awareness about its potential value in managing unexpected veterinary expenses.

Pet owners are highly aware of rising expenses in various categories. Over the past year, 61% report seeing cost increases, with pet food being the most affected at 57%. Additionally, 38% observed higher veterinary care costs. Slightly lower, but still significant, were noticeable price hikes in medications and toys.

### Postponing vet care

The most concerning finding in the data is the postponement of veterinary care, with 1 in 5 pet owner respondents having skipped or delayed vet visits due to cost. This trend could have profound implications for animal health and welfare.

Delay in preventive care often becomes emergency care – typically something that comes with much higher costs and greater risks to pet health.

This veterinary care gap is particularly troubling given that 46% of pet owners regularly budget for vet care, suggesting that even those who prioritize medical expenses are finding costs prohibitive. The 15% who have canceled pet insurance further compounds this problem, removing a financial safety net precisely when it might be most needed.

The ripple effects extend beyond individual pets to the broader veterinary industry. Vet practices may well see a decrease in routine visits and an increase in emergency cases – a pattern that strains resources and potentially drives costs even higher.

### Concerns for the future

Pet owners' expectations for the future suggest the current pressure is far from temporary. Over half (52%) believe pet product prices will continue rising over the next 12 months, while a similar percentage express concern about their ability to afford pet care in the coming year.



*More than a third of the respondents say rising costs would make them less likely to adopt or purchase another pet in the future.*

Notably, 19% describe themselves as “very concerned” about future pet care affordability, while just 37% say they are “not very concerned” or “not at all concerned”.

These concerns are already influencing major life decisions. More than a third of the respondents (35%) say rising costs would make them less likely to adopt or purchase another pet in the future, while 44% maintain that costs wouldn't change their decisions. This split suggests potential long-term impacts on pet ownership rates and, consequently, on shelters seeking new homes for pets and on the broader pet industry ecosystem.

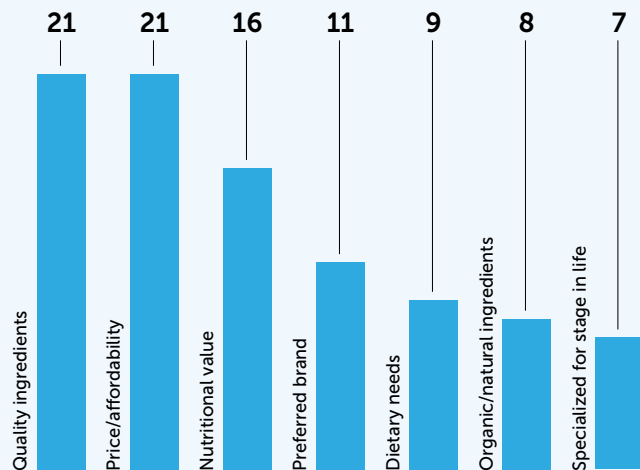
### Industry turning point

The research findings highlight both challenges and opportunities for pet industry stakeholders. The data reveals an industry at an inflection point. Rising costs are creating genuine hardship for pet owners, forcing choices that may compromise animal welfare and potentially limit future pet ownership.

However, the underlying commitment to pets remains strong – pet owners are adjusting rather than abandoning their responsibilities. ♦

### Key factors in pet food purchasing decisions

(in %)



Source: CivicScience



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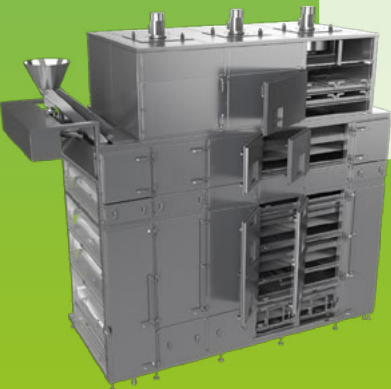
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# The pet bed market Customizing comfort



**Consumers are looking for more sophisticated sleeping accessories that meet their pet's individual needs and can easily be moved from one place to another.**



**Adam England**  
*Contributor*  
*PETS International*

With owners increasingly treating their pets as part of the family, they're willing to spend more on products such as beds, crates and cushions. Accordingly, the global market in this sector is estimated by Future Market Insights (FMI) to grow from \$5.4 billion (€4.6B) in 2025 to \$10.5 billion (€8.9B) in 2035.

## Where are pet parents buying?

According to FMI, online retail dominates pet bed sales, with 66% of consumers buying there because of price, availability and consumer reviews. Convenience is also a factor. However, 50% of European consumers still shop offline in order to physically touch and feel the level of comfort and fit of the product before they make a purchase.

FMI analysis shows that major retailers such as Amazon, Chewy and Petco have been at the forefront of customizable and smart products, indicating that these items have firmly begun to enter the mainstream.

And with disposable incomes increasing in many markets, consumers are willing to pay extra for something that brings added benefits to themselves and their pets.

## Appeal of customization

"Customizable options are on the rise, particularly regarding size, firmness and fabric," says Joe Chanda, founder of US company Bully Beds. "Pet parents want to provide their pets with a specialized bed for their needs, but also consider their home decor."

Durga Gandhi, a Product Development Consultant and buyer, has noticed an increase in the number of customizable and smart beds at pet trade fairs and "more players" in the market. "We are now more obsessed with data – and what we can do with it – than ever before. I think it is due to rapid growth in the pet space," she explains.

## Health and comfort benefits

Gandhi says that pet owners are willing to pay more for a comprehensive product to save themselves "stress, headache and money" further down the line. Chanda is seeing increased consumer interest in

[▶ SEE NEXT PAGE](#)



features including “temperature adjustment, orthopedic memory foam with tracking, and active sleep analysis powered by artificial intelligence”. He believes that features need to address real issues – such as health and comfort – while not making the product itself too complicated to use.

Rosica Petrova is the founder and CEO of Bulgarian-based company Home of Wool, which produces customizable pet beds made from hypoallergenic and breathable wool. “For us, it was always about providing pets with the same comfort and health benefits we can offer to their owners,” she says.

Meanwhile, Domethics, an Italian company in the Internet of Things industry, has developed the Carepet, a smart pet bed that monitors health indicators including heart rate, respiration and sleep quality.

Pet owners can share data on the app with their vet if they’re concerned about something. With the growth of smart collars like Tractive’s pet health trackers, it wouldn’t be surprising if more companies were to go down this route.

### Dog-friendly adventures

When considering travel with their pets, owners are looking for products that are portable, yet still meet their pet’s needs. More people than ever are taking their pets with them when they go away. Over three-quarters (78%) of US pet owners do this each year, according to GlobalVetLink, while a study from the UK’s University of Surrey indicates that the dog-friendly travel sector will be worth almost £40 billion (€46B/\$54B) by 2030.

Gandhi suggests that there may be a link between increases in separation anxiety and the desire to take pets on vacation. Christine Chau, Creative Director and Chief Product Designer at the UK dog bedding company Charley Chau, believes the increase in dogs being considered family members means they’re included in more family experiences.

“The travel industry was quick to recognize the value of the ‘hound pound’, so for the past 10 years or so an increasing number of hotels, B&Bs and cottages have welcomed doggy patrons, which has impacted the demand for travel-friendly dog bedding,” Chau says.

Charley Chau offers travel pads with slimline mattresses that are suitable for dogs to sleep on at home, in the car and on vacation, as well as ‘burrow bags’, which contain the same mattresses and look very much like human sleeping bags.

### Alleviating anxiety

Chau first offered travel-friendly lines in 2012. “A change in environment can be stressful for many dogs. One way of reducing their stress is to make sure they’re comfortable – and therefore content – so they can quickly settle into their new surroundings,” she says.

“With all the luggage you already have with you, it’s very important that a dog bed is lightweight and easy to transport, while still delivering supreme comfort,” Chau continues, highlighting features such as moisture-wicking and quick-drying fabrics and anti-microbial waterproof liners.

Leena Chitnis, founder and CEO of Californian-based Timberdog, started the company when she spotted a gap in the market for dog beds suitable for camping, after realizing that she had the outdoor gear she needed for herself – but not for her dog. She sketched out the multifunctional RuffRest bed based on features designed for the comfort of dogs and ease of use for their owners.

### Seamless transitions

Michael Leung, co-founder and Lead Product Designer of Sleepypod, another Californian company, says the brand first introduced its mobile pet bed – which doubles as a carrier and a car seat – back in 2006, to offer “unmatched safety while helping to mitigate pet travel fear”.

Leung explains the brand promise: “Sleepypod’s multifunctional designs encourage positive associations, by seamlessly transitioning from cozy, everyday pet bed or napping spot to a carrier, and then a crash-tested car safety restraint.”

As owners’ enthusiasm for involving their pets, particularly dogs, in pastimes, holidays and activities only increases, the pet bed market remains one where there could be space for further premiumization and customization. ♦



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