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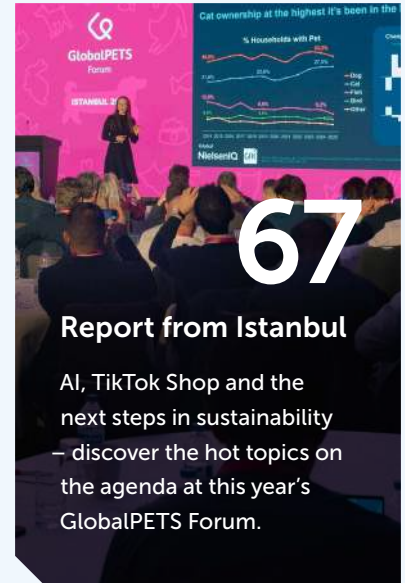
*from tradition —
to disruption*



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A look ahead to the year

This year's GlobalPETS Forum in Istanbul was an exciting opportunity to explore emerging trends, connect with business leaders and discuss in person the state of play of our industry. I want to thank everyone who joined us, and I hope to see you again in Lisbon in 2027.

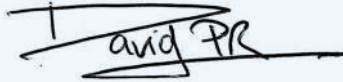
This is our first issue of 2026 and we start the year with several compelling topics. Supplements and vitamins are playing an increasingly important role in the industry. We analyze the market, consider how the category is performing on Amazon and offer insights into consumer behavior.

Regions to watch this year include the Middle East, North Africa and Turkey. We explore the specifics of each market, how consumers are becoming more knowledgeable about the food they feed their pets and the current shape of the competitive retail landscape.

Challenging times lie ahead, making it more important than ever to identify market opportunities.

Over the past months, we've analyzed the trends that will influence the coming year and we are excited to present our 2026 Trends Report. You can find a preview on page 14 and the full report is available now to download.

Wishing you an inspiring read.



David Palacios Rubio
Editor-in-Chief



“The beginning is the most important part of the work.”
PLATO, ANCIENT GREEK PHILOSOPHER



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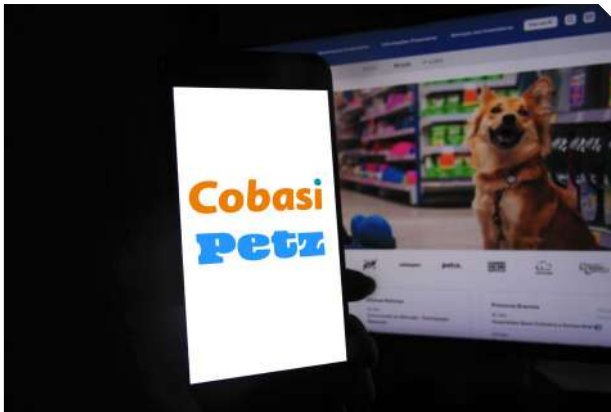
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Petz and Cobasi finalize merger

Following a process lasting nearly two years, Brazilian pet retailers Cobasi and Petz began joint operations under the name União Pet on 2 January with new management.

On completion, Petz shareholders will collectively hold 52.6% of União Pet's share capital. Despite the new structure, Petz and Cobasi's physical and online stores will continue to operate under their respective brands.

Following the unification of shareholder bases, Petz shareholders will receive R\$320.7 million (\$60M/€51M) in cash, plus one common share in União Pet for each Petz common share held.

The merger was approved by Brazil's Administrative Council for Economic Defense (CADE) on 10 December. The combined company will become the largest pet retailer in the country. Initially, the merger received unconditional approval from CADE in June 2025 but the regulator reopened the review process after competitor Petlove appealed the decision, warning of irreparable harm to competition.

As a "competitive reinforcement", the approved Merger Act "imposes several behavioral commitments" and requires the sale of 26 stores in the state of São Paulo, Brazil's largest commercial center. These stores are equivalent to 3.3% of the combined company's revenue over the last 12 months.

China opens market to UK pet food

The UK and China are working to allow cat and dog food exports from the UK to enter the country for the first time.

In November 2025, the General Administration of Customs of China (GACC) said pet food imports from the UK and Northern Ireland are allowed, subject to inspection and quarantine rules. Requirements include approval from the UK Department for Environment, Food and Rural Affairs (Defra), a hygiene management system based on international standards and GACC registration.

"Work remains ongoing to agree details between Defra and GACC, such as export health certification requirements," say UK officials. GACC also set limits on raw materials and animal sources and imposed strict safety, processing, packaging and transport rules.



EU animal welfare rules set for 2028

A provisional deal between the European Council and Parliament setting EU-wide minimum rules for animal welfare and traceability will be implemented in 2028.

The rules will regulate breeding, limiting frequency and age, and ban hybrid breeding and parent-offspring pairing. Painful mutilations such as ear cropping, tail docking and declawing will also be prohibited.

Breeders, sellers and shelters must provide dogs adequate care and outdoor access, and all cats and dogs, including imports, must be microchipped and registered in EU-wide databases.

Wrapping up 2025 with the latest acquisitions

In December last year, major European pet players completed deals to expand their retail and production footprints.

Swedish pet player **The Nutriment Company** (TNC) ended 2025 with two acquisitions: Antos and Zoo Factory. Antos is a Dutch distributor and developer of pet treats. Founded in 1989, the company also manufactures snacks, including biscuits, sausages and chews made from natural ingredients such as tripe, rawhide and animal ears.

Zoo Factory is a Polish distributor of premium pet treats and food. It has a portfolio of over 250 products, spanning cat litter, treats, cleaning products, accessories, toys and pet food, under two brands: Hilton and Animals.

Meanwhile, French pet e-commerce player Zoomalia was acquired by **Holding Nicole**, the parent company of JMT Réseau & CentralT, which operates the JMT Le Royaume des Animaux retail chain, for an undisclosed amount. Zoomalia is an online retailer of pet food and supplies based in Saint-Geours-de-Maremne in southwestern France.

Lastly, Nordic pet care specialist **Musti Group** acquired the Portuguese retailer and services provider ZU. Musti announced that it bought 100% of ZU's shares from the retailer MC for €12.9 million (\$15M) on 5 December.



Amadeus forecasts a pet-first shift in global tourism for 2026

The Amadeus Travel Trends 2026 report lists the 'Pawprint Economy' as the top trend expected to shape the travel industry this year.

The travel software firm forecasts continued growth in pet-friendly travel in 2026, as key destinations introduce new regulations and services. These include China's pet-friendly high-speed rail services, Italy's approval of in-cabin dogs on flights and the UK's rollout of pet passports.

However, barriers such as stressful pet experiences and destination restrictions still concern pet owners.



Court mandates liquidation of Ynsect

French insect firm Ynsect will liquidate its assets, as per a judicial order from the commercial court of Évry. In 2024, Ynsect sought a safeguard plan to restructure its balance sheet, but efforts fell short.

"The company now has solid technologies and an operational model, even though the required funding could not be secured in time," says Emmanuel Pinto, President of Ynsect. In June 2025, Ynsect sold its farm in Dole, which produced 200,000 tons of insect ingredients yearly.

Pinto hopes the skills from Ynsect's teams will be used "productively and contribute to Europe's protein independence and the fight against climate change".



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International shoppers turn away from American brands

Recent surveys from global market researcher Ipsos have found an average 22-point drop in trust for US products in non-US markets and a 21-point drop in purchase intent for brands perceived as American.

Rejection is highest in the UK and Canada. In fact, earlier research showed 42% of Canadian consumers would “do everything” to avoid buying US products.

In the US, however, the opposite holds true: association with America boosts willingness to buy by six points and trust by nine.

In pet food, owners rarely change their companion’s food because of concerns about possible health consequences. This makes them more loyal to pet brands than to human food labels, while recommendations and regulations also influence their purchasing decisions.



Swiss fragrance producer Givaudan sets sights on pet market

Givaudan, a global leader in the manufacturing of flavors, fragrances and active cosmetic ingredients, has set its sights on the pet care market as part of an expansion strategy.

The company plans to invest 8% of its revenue over the next five years in technologies for flavoring solutions and active ingredients, including dog and cat food.

Givaudan has dedicated technical and regulatory teams to support the company’s moves into the pet care market.

The pet business will initially focus on Europe and North America, with plans to expand into other regions around the world.

EU-Mercosur deal likely to boost pet food trade

The EU and the South American trade bloc Mercosur have signed a Partnership Agreement (EMPA) and an Interim Trade Agreement (ITA) to facilitate trade between the EU and Argentina, Brazil, Paraguay and Uruguay.

The deal will include removing or reducing tariffs on a wide range of goods, including pet products, agrifood, chemicals, pharmaceuticals and cars. Tariff cuts will be phased in over 15 years.

Pet food, ingredients and supplies are among the products receiving either tariff exclusions or reductions, depending on composition. The treaty explicitly covers “dog or cat food put up for retail sale”, as well as ingredients used in animal feed, such as grape marc, acorns, maize stalks and leaves, and other plant residues.

Beyond pet food, it includes “saddlery and harness for any animal”, such as leads, muzzles, dog coats and related goods.

The agreement foresees cooperation on animal welfare standards, biotechnology and food safety. From an industry perspective, EMPA is seen as an opportunity for imports and exports in both regions.





EU targets cheap imports

European finance ministers agreed in November to remove the €150 (\$175.42) customs duty relief threshold. The EU also plans to roll out a €2 (\$2.33) handling fee.

The rule is scheduled for 2028, but temporary measures may be brought in this year to collect duties on e-commerce packages. Authorities believe that ending the tax relief will benefit businesses within the bloc: "This competition can become unfair and hinder the level playing field for legitimate businesses."

The value of low-cost goods imported to the region via e-commerce reached €4.6 billion (\$5.4B) in 2024. According to the EU Commission, this coincided with "exponential growth" in Shein and Temu's market reach, with over 75 million users.

Pet retailers embrace q-commerce with new partnerships

E-commerce and delivery services are rapidly expanding access to pet products worldwide. In the US, the recently launched Amazon Now offers 30-minute deliveries of household essentials including pet food in parts of Seattle, Washington, Philadelphia and Pennsylvania.

In Canada, Pet Valu and its four brands – Bosley's, Paulmac's Pets, Tisol and Total Pet – have teamed up with Uber Eats and DoorDash at 600+ locations nationwide. Pet Supplies Plus also offers same-day delivery via Instacart from 700+ stores across North America.

In Europe, Kiwoko and Tiendanimal are working with Uber Eats across Spain, offering 5,000+ products from 190 stores, while Pets Corner is partnering with Deliveroo in Brighton and London. French supermarket Chronodrive is offering pet supplies via Amazon France in six stores in Bordeaux, Grenoble and Lille.

Colombia's leading pharmacy chain opens pet store concept

Colombian pharmacy chain Cruz Verde has launched pet store concept CruzPet, claiming it is the first such outlet in the country to merge human and animal services.

The first store in the country's capital Bogotá offers pet food, medicines, supplements, hygiene and wellness products, and accessories for cats and dogs.

"We identified a structural shift in the market: accelerated growth in the pet segment, with a clear need for accessible and professionally supported solutions," says Julio César Martínez De Vivero, Cruz Verde's President.

Store expansions are planned in "strategic locations", though specific sites have not yet been revealed.



India: major FMCG and pharma players tap into the pet industry

Indian corporations are venturing into the pet care market amid rising domestic demand and a growing pet population.

Reliance Consumer Products, the FMCG arm of Reliance Industries, which is aiming to become the largest consumer goods company in India, is moving into pet care with the launch of Waggies. Reports say the company plans to price the pet food brand 20-50% lower than market players to give consumers more accessible options.

Mankind Pharma, one of India's top five pharmaceutical firms, has entered the cat food segment with the launch of PetStar Delight. The company's first foray into the pet care market was the launch of PetStar dog food in 2022.

Additionally, healthcare platform Tata 1mg launched PawsNPurrs, a new vertical offering medicines, supplements, food and grooming products for pets.

PET INDUSTRY FACT FILE

DATA INSIGHT

91%

of imports into the EU costing under €150 (\$175) in 2024 came from China, according to the EU Commission.

Indian pet player **Heads Up For Tails** raised \$25 million (€21M) in a Series B funding round.

Ukraine-based agri-food producer **MHP** is set to open a new wet pet food factory in Croatia in the first quarter of 2026, following a €40 million (\$44M) investment.

TOP 3 INVESTMENTS

KatKin, a British fresh cat food brand, raised \$50 million (€46M) in Series C equity and debt funding to accelerate its expansion nationwide.

NEW APPOINTMENTS

VAFO PRAHA

Milan Bartoš has been appointed Managing Director of the premium pet food manufacturer.

Mars Petcare

Marc Carena is the new Global President of the multinational's pet business.

Tom&Co

The Belgian pet retailer has named Pascal Clouzard as Chairman of the board of directors and Anna Mao as Chief Procurement & Supply Chain Officer.

TOP WEB NEWS

UK-China pet food trade deal

Chinese government opens door to British dog and cat food imports.

LATEST NEWS



2015-2025 A decade of petflation

A PETS International analysis shows that pet-related price increases have been particularly steep in Brazil, the UK and Australia over the past 10 years.





Thaís Matos
Senior Business Reporter
GlobalPETS

The cost of keeping a pet has surged over the past decade in some of the world's major economies. Official data from Europe, the UK, the US, Brazil and Australia shows that inflation related to pet products and particularly veterinary services has put mounting pressure on households.

The Eurozone and the US

In the Eurozone, the Harmonized Index of Consumer Prices indicates that products and services related to pets, including food and veterinary care, rose by 31.5% between 2015 and 2025. This figure is higher than general inflation, which grew by around 30% in the same 10-year period.

In the US, Consumer Price Index (CPI) figures from the Bureau of Labor Statistics show the same spiking trend for pet food and treats. The historical series has December 1997 as the base 100. Since then, the increase has been significant, reaching more than 191 in August 2025.

This number is lower than during the peaks of over 192 points recorded in 2023 but remains high. From August 2015 to August 2025, the average increase in the price of pet supplies has been 27.7%.

Brazil, the UK and Australia

In Brazil, the official inflation index tracks three prices linked to the pet market: treatment (clinics), hygiene services and food. All grew above the general index that measures consumer inflation in the country. Between 2015 and 2025, general consumer prices increased by 68.8%. Pet treatment rose less than that (52%), but for pet food the surge was considerable (83.2%), indicating significant pressure on pet owners.

In the face of high inflationary pressure, consumers may switch to cheaper products, buy less often in larger volumes and postpone appointments.

The scenario is not much different in the UK. In the same period, cumulative inflation for pet care was 48.7% according to data from the Office for National Statistics (ONS). The index for veterinary and other pet services shows a surge of 74.9% between August 2015 and August 2025.

Australia follows a similar pattern, although at a lower level. Over the past 10 years, prices for veterinary and other pet services have increased by 57.2%, according to the Australian Bureau of Statistics (ABS). The jump in pet and pet-related products was slightly smaller at 39.4%.

A closer look at 2025

Within the analyzed 10-year period, the market hit an inflation milestone: post-pandemic recovery, which led to record high prices in 2022. So although the jump is large, and higher than the general indices, pet inflation did start to normalize last year. Comparing 2023 and 2024 with 2025 helps to clarify the recent price trajectory, with most regions seeing some relief in cost upticks, while the UK shows an acceleration.

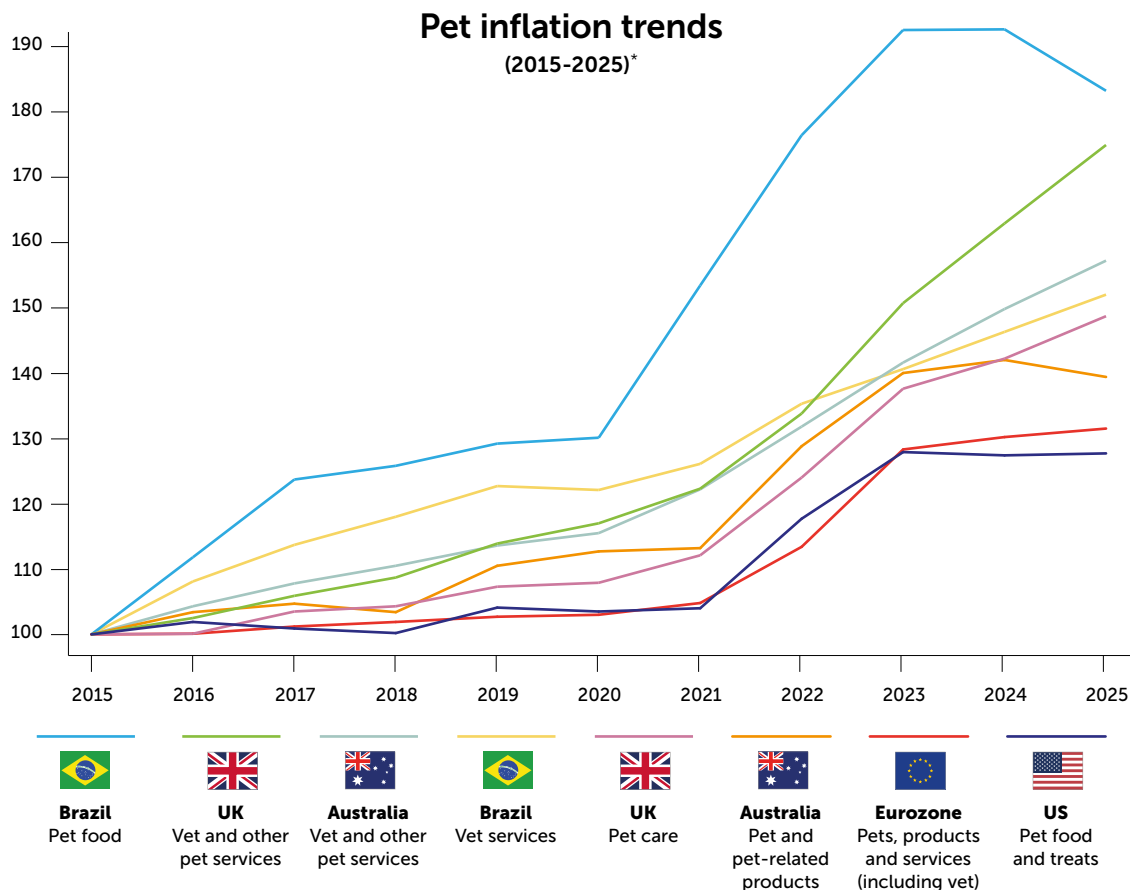
In Brazil, for example, pet food in 2025 was 4.9% cheaper than in 2024. Even though prices for pet treatment have been increasing (3.9%), this is less than in the previous year (4.1%).

In the US, overall pet and pet product costs remained unaltered in the past two years. In the UK, however, pet care costs still increased (4.6%), at a rate higher than the previous year (3.3%).

Europe and Australia showed similar patterns: overall inflation for pet products and veterinary services continued to rise, but at a slower pace. In Europe, the annual rate declined from 1.4% in August 2024 to 1% in August 2025. In Australia, inflation eased from 5.8% in Q3 2024 to 5% in Q3 2025.

Almost all economies recorded lower price growth compared to the post-pandemic peak. "We've seen inflation really come down on all things like food and supplies, and prices have started to stabilize in that area," says Andrea Binder, VP and Pet Industry Insights Leader at Nielsen IQ.

► [SEE NEXT PAGE](#)



Sources: European Central Bank, Office for National Statistics (UK), Bureau of Labor Statistics (US),
 Australian Bureau of Statistics, Brazilian Institute of Geography and Statistics
 *Figures shown as an index, with 2015 set as the base year (2015 = 100). August is the reference month.

The high cost of vet services

According to Binder, veterinary care is one of the sectors where prices have yet to stabilize, with the US seeing an increase of around 6-7% versus 2024.

The American Veterinary Medical Association (AVMA) attributes rising veterinary fees to a combination of higher medical supply and pharmaceutical costs, increasing operational expenses and ongoing investment in advanced technologies. Longer pet lifespans further add to the trend, leading to more frequent and complex medical needs over time.

In the UK, consumers complain about poor cost transparency, as well as a lack of alternative and affordable treatments. In response, the Competition

and Markets Authority (CMA) launched a market investigation earlier in 2025 to address “concerns” in the sector, including medicine being sold at up to three to four times the purchase price.

In October, the authority published its provisional decision in the case. The CMA found that pet owners pay, on average, 16.6% more at practices belonging to large veterinary groups than at independent practices, and that profits across a significant portion of the market are well above levels that would be expected under effective competition.

Rising price of pharmaceuticals

In Australia, a report by pet health tech company PetSure shows that the rising cost of pharmaceuticals,

"which make up around 30% of total veterinary expenses" is a point of concern. In 2023, the gap between veterinary treatment inflation and average consumer price rises widened significantly, with veterinary costs rising faster than general inflation.

"While this gap narrowed slightly in 2024, veterinary pharmaceutical costs continued to outpace the broader cost of living," PetSure says. According to ABS, Australia's CPI rose by 2.4% last year, while pharmaceutical product price rises were higher, at 4%.

Knock-on effects

In the face of high inflationary pressure, consumers tend to change behavior and that can even affect pet ownership. They may switch to cheaper products, buy less often in larger volumes and postpone appointments.

This is already reflected in some companies' investment decisions. In an interview with the UK newspaper the *Financial Times*, the CEO of Mars points to inflation's trajectory as a driver of consumer spending cuts and a reason for the focus on diversification to reduce exposure.

It also represents greater pressure and potential risk. Meanwhile, General Mills reports modest expectations amid ongoing inflation in input costs and competitive pricing pressures.

In its Q3 2025 earnings report, Nordic pet retailer Musti Group flags concerns about both rising input costs and weakening consumer sentiment.

The company notes that higher energy, raw material and freight expenses have pushed up its cost base, leading to increased retail prices in order to protect profitability. "Higher inflation will also contribute to higher interest rates. These may have an impact on consumer behavior and price competition," the company warns.

Although the accumulated inflation of pet products weighs on consumer pockets, price rises show signs of slowing down in most major economies, at least in terms of goods. Meanwhile, with increased consumer sensitivity and regulatory pressure on the veterinary segment, the sector will have to find a balance between cost recovery and affordability. ♦

The AVMA attributes rising vet fees to higher medical supply and pharmaceutical costs, increasing operational expenses and investment in advanced technologies.



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2026: what's next in the pet business?

GlobalPETS compiles
the seven trends poised
to influence the industry
this year.

Global economic and political pressures, tariff turbulence and an overall picture of uncertainty remain the backdrop for the pet industry. From economic headwinds to the growth of AI, hyper-personalized purchasing models and functional nutrition, the GlobalPETS 2026 Trends Report reveals what pet businesses need to take note of in the coming year.

The onward march of AI

2026 promises to be the year that AI becomes an integral part of everyday life for many consumers, including pet parents. Companies are becoming increasingly aware of the need to make AI enablement a top priority in areas as varied as loyalty programs and supply chain logistics.

Powered by sophisticated AI capabilities, consumers are coming to expect higher levels of personalization. We look at how tailored purchasing models look set to become even more finely tuned in the drive to win and retain customers.

Using AI to analyze complex datasets provides the opportunity for predictive health monitoring, virtual veterinary consultations, nutrition plans and tailored feeding solutions. And high-tech applications have the

potential to expand even further into pet training tools, toys and more.

A business model for every pet owner

The consumers of 2026 demand flexibility and tangible benefits in exchange for their business. As they seek value for money at the same time as they want options that fit seamlessly with their lifestyles, companies that offer an attractive range of choices, hyper-personalization and low commitment will be making the running. Close analysis of generational trends, both in terms of income profiles and attitudes towards pets, can help effectively target different demographics.

Retail: comfort and convenience

Owners express concern when they feel their pets could be missing out and want the reassurance of knowing their pets' needs can be easily and swiftly taken care of – something which is part of what is becoming known as a 'comfort zone mindset'.

As consumer expectations for fast and convenient delivery intensify, major retailers are enhancing their in-house delivery options, while also working with the proliferation of global and local q-commerce operators.

In-store experiences and apps will aim to become more comprehensive and attractive. Retailers are also experimenting with compact brick-and-mortar retail models in strategic, often urban, locations such as metro stations. These can offer a carefully curated product selection, act as a collection hub and aim to become a part of everyday consumer routines.

Building loyalty

Despite a challenging and sometimes volatile economic environment, consumers nonetheless demonstrate a consistent loyalty to their pets and their care. Businesses must look for ways to capitalize on this enduring sentiment to inspire loyalty to their own brands. In a similar vein, major retailers are aiming to improve the quality and appeal of their private labels to take a greater market share.

Providing flexible options, promising a commitment to sustainability and building community are all strategies we have identified in the pet sector. In the online arena, we also consider how brands need to adopt more targeted and savvy strategies to attract customers searching for pet solutions.

Macroeconomics and geopolitics

In an inter-connected global landscape, where changes in circumstances can happen very quickly, there is no doubt that events such as regional conflicts and the ups and downs of currencies (most crucially the dollar) have far-reaching effects.

Although inflation is plateauing, there are indications from holiday spending data that consumer confidence is fragile – even if pet spending is so far holding its own. In the wake of the vicissitudes of the past decade, economists highlight the deepening of the ‘K-shaped’ economy – a trend that sees better-off families continue to spend heavily and increase their wealth, while those on lower incomes bear the brunt of economic hardship.

We also consider additional factors, including the EU’s Packaging and Packaging Waste Regulation (PPWR), which comes into effect this year. A reorganization of taxation within the EU could also have major implications throughout the pet industry.

Inflation, tariffs and supply chains

While predictions are for rates of inflation to continue to level off, both the threat and implementation of higher levels of tariffs continue to present challenges. The American Pet Products Association (APPA) reports that the pet category saw an increase of approximately 29% in tariffs over the past year, underlining the pressing need for manufacturers and brands to find strategies to minimize their impact – in the US and beyond.

As well as the possibility of more international agri-food agreements and partnerships, we can expect supply chain reorganization and an accelerating drive towards self-sufficiency. AI will be used to maximize efficiency and optimize the supply chain.

Gut health and functional nutrition

With a projected 14% year on year growth of the supplements category last year in the US – a rate higher than the overall pet industry – this is a segment that pet nutrition businesses, large and small, can’t afford to ignore.

An interest in wellness and longevity for pets continues to gather pace, pushing owners to increase their demand for supplements and proactive health products. Spearheaded by dog owners, products targeting digestive and joint care lead the charge in the rising demand for functional and targeted pet supplements. ♦

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MADE IN THAILAND



Lap of luxury: the high-end cat accessories market

Owners remain willing to spend more on premium products tailored to their pets' comfort – despite the durability of this market being tested by inflation and discount marketplaces.



Adam England
Contributor
PETS International

Against the backdrop of impressive growth forecasts for the premium cat accessories market, we look at what is driving the rapid expansion. Even more importantly, as disposable incomes decrease and budget online shopping sites like Temu and Shein continue to gain ground, can this growth be sustained?

Snapshot of the market

The global pet accessories market is expected to grow to almost \$10 billion (€8.6B) in 2030, compared with \$6.71 billion (€5.7B) in 2024, according to Grand View Research. Owners are spending more on accessories as they view their pets as family members and are willing to invest in customized and luxury items. Euromonitor's Pet Care in Western Europe report from 2024 suggested that premium products are outpacing value goods.

The cat accessories market is expanding faster than many other pet care areas, with Grand View Research projecting demand to rise at a compound annual growth rate of 7.7% until 2030. Data from Axial Insight Dynamics suggests UK pet owners spend over £7.9 billion (€9.1B/\$10.7B) on pet products annually, with the share of cat-specific accessories getting bigger each year.

Shift towards comfort and luxury

Besides being driven by higher-priced and personalized products, the boom in the feline segment may also be due to more cat ownership in urban areas and a shift towards products that put comfort and style at the forefront.

[▶ SEE NEXT PAGE](#)

Despite the economic pressures, many cat owners are still willing to pay a higher price, or wait longer, for products with a focus on comfort and appearance.



Personalized bowls and collar tags are popular ways for pet owners to express their pets' identities and preferences, as well as their own. At the same time, everyday items like collars, bowls and harnesses are being made more luxurious, for example, while products like beds and cat towers increasingly resemble high-quality furniture.

Appeal of independent brands

Another contributor to the market growth has been the increase in smaller companies offering products through platforms like Etsy. Such websites allow consumers to connect with independent brands and artisans offering an alternative to major retailers.

The product range of Cheshire & Wain, a UK-based cat accessories business launched in 2013, includes luxury cat collars and engraved ID tags. The company sends each order out with a handwritten note and connects with customers and their cats on social media.

"Delivering a personalized customer experience was a core mission from the beginning. Developing these personal relationships is what made us investigate how we could offer something more tailored within our collection, too," says Sonja Farrell, founder and Creative Director. "In 2016, we started offering hot foil personalization on our leather cat collars, and it became an instant hit."

Inflationary pressure and budget platforms

Disposable income has decreased in real terms in some markets, with inflation rising faster than wages. Combined with the rise in popularity of vast online marketplaces offering low prices, including Temu and Shein, high-end cat accessory brands now have greater competition.

For example, a pack of 10 reflective cat collars sold by Temu costs £2.35 (€2.71/\$3.18) for consumers in the UK, whereas one of Cheshire & Wain's reflective cat

collars is £45 (€52/\$60). A personalized cat bowl from British ceramics company Emma Bridgewater starts at £33 (€38/\$45), while a customizable bowl is priced just £5.10 (€5.90/\$6.89) on Temu.

Farrell acknowledges that Cheshire & Wain will lose some sales. “The pet products market has been flooded with cheap alternatives and dupes from sites like Temu in recent years,” she says.

“But I believe consumers are waking up to the fact that buying these items is a false economy. It’s not as easy to guarantee their quality and safety versus purchasing from a well-known and trusted brand,” she continues. She explains that the business can’t compete on price without sacrificing quality, and so it doesn’t try to. Instead, it positions its products as luxury goods and prioritizes brand equity.

Special and unique

Farrell adds that “the array of cheap and low-quality items has allowed us to really shine a spotlight on what makes us special”. She highlights Cheshire & Wain’s Gold Label line, saying it has taken the company’s product design in a “slightly different direction”.

Other brands have seen similar patterns. “[Discount marketplaces have] been something of a marketing funnel for us,” says Leili Farzaneh, co-founder of UK cat accessories company Supakit. Some customers turn to the company after unsatisfying experiences with discount marketplaces or lower-quality goods. Consumers may pay more, but this is in exchange for a more positive experience and higher-quality goods.

Peak demand for high quality

Farzaneh adds that Supakit offers “not luxury for luxury’s sake, but for the sake of a cat’s safety, wellbeing and comfort”, observing that its customer base values quality and longevity when it comes to products such as cat collars and harnesses.

Another firm supplying collars, harnesses and apparel for cats and dogs is Lucy & Co., which is based in the US. “We’re seeing a shift in the cat accessories market that I personally didn’t expect,” says Anna Knutson, Director of Marketing. “Cat parents are wanting elevated, high-quality products just like dog owners

A growing number of premium brands now refuse to sell through platforms like Amazon, directing consumers to their own websites where they can control the journey.

have for their pups... The demand for independent brands to make high-quality products is at its peak.”

Two parallel streams

So despite the economic pressures, many cat owners are still willing to pay a higher price, or wait longer, for products with a focus on comfort and appearance. This is creating two parallel markets: a budget tier where price is key, and an upper tier where design, safety and comfort are prized.

In fact, many premium brands are now refusing to sell their products through platforms like Amazon. Instead, they direct consumers to their own websites where they can control the journey and reinforce their high-end positioning by offering a more curated service.

Why brands are branching out

With owners continuing to spend more on cat accessories, the market might see more brands diversifying into the category. Like Emma Bridgewater, human lifestyle and apparel brands are moving into pet products, and dog accessory companies are increasingly catering to cats too.

Lucy & Co. is looking at expanding its cat range and could develop feline versions of its personalized dog tags. Meanwhile, Supakit has branched out in the other direction, launching a sister brand – Rowlie – for small dogs after it realized owners were buying products from its cat range. While cats can still use many products designed for dogs and vice versa, it would not be surprising to see more businesses expanding in this manner.

While cheaper options have flooded the market, the evidence shows pushback from pet owners who prioritize comfort and style, preferring branded companies with a high level of trust. Therefore, it’s difficult to imagine anything other than luxury and custom products increasing in popularity in the medium term. ♦

Sanicat®

— Nature at heart —



ESSENTIAL OILS

ODOUR CONTROL

THE 1ST ULTRA CLUMPING
LITTER WITH ESSENTIAL OILS
ODOUR CONTROL



**INNOVATIVE
PRODUCT
OF THE YEAR***



**INTERESTED?
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*Promojardin-Promanimal (France, 2025)





Tolsa SPAIN

Sanicat Essential Oils receives Innovative Product of the Year recognition

Sanicat introduces an essential oil-based cat litter concept focused on natural odor control and premium positioning.

Life with cats is full of joy and playfulness, yet also brings a few compromises, particularly around maintaining a fresh and clean indoor environment. A healthy, odor-free environment is essential for both pet owners and their feline companions. With this in mind, the company introduces Sanicat Essential Oils: the first ultra-clumping cat litter to use essential oils as natural odor neutralizers.

A new era in odor control

With more than 65 years of experience in the European cat litter market, Sanicat launches the Essential Oils range as a new step in freshness solutions. The product was recently awarded Innovative Product of the Year at the Promojardin-Proanimal Innovation Trophies for Pets and Garden Universe in France, reinforcing Sanicat's leadership in premium pet care.

The science behind the freshness

Unlike traditional cat litter, Sanicat Essential Oils neutralizes odors through a three-step process.

- **Adsorption:** unpleasant odor molecules are captured and held on the surface of the essential oil
- **Absorption:** the molecules are then locked inside the oil droplets
- **Neutralization:** odors are permanently eliminated, supporting longer-lasting freshness

Designed for feline sensitivity

According to José Barco, Chief Sales and Marketing Officer at Sanicat, the range leverages the functional properties of essential oils while respecting cats' sensitive sense of smell.

"The formulation avoids intrusive fragrances and ensures feline wellbeing. With this innovation, we're offering an experience inspired by nature and aligned with environmental considerations."

Varieties for different needs

The Essential Oils range consists of six ultra-clumping options to meet different household preferences.

Two unscented varieties, available in ultra-white or beige bentonite, are designed for those prioritizing maximum odor control without added fragrance and provide up to 50 days of hygiene.

Four delicately scented options, Cedar and Eucalyptus, White Jasmine, Orange Floral and Argan Oil, combine subtle fragrance profiles with functional performance and offer up to 60 days of hygiene.

Sustainability focus

Sanicat Essential Oils is available in 10kg FSC-certified paper packaging with a viewing window, allowing buyers to see the product before purchase.

The packaging forms part of Sanicat's broader commitment to sustainability and reducing plastic use across its product portfolio. ♦

Tolsa S.A.
tolsa.com

FUZZIES®

STRUCTURE AND CONSISTENCY IN THE SUPPLEMENT CATEGORY

The pet supplement category is changing. Where purchases were long driven primarily by acute issues, the market is increasingly shifting toward routine use and long-term wellbeing. Not new ingredients, but consistent use has proven to be the decisive factor.

This insight formed the starting point for Fuzzies.

Instead of beginning with products, the team behind Fuzzies first looked at behavior. How are supplements actually used in practice? One pattern kept recurring: many supplements are purchased with good intentions, but usage often declines after a few weeks. Not due to a lack of motivation, but because of the absence of a daily structure.

Fuzzies was developed specifically to provide that structure.

At the heart of the concept is the **Kickstarter**. This has been deliberately developed as a preparatory step to enhance the effectiveness of the supplements. Rather than starting immediately with active supplements, the Kickstarter first focuses on supporting the digestive tract and intestinal lining.

The underlying idea is simple: when gut function is not optimal, active ingredients are absorbed less efficiently. By supporting this foundation first, a better starting point is created for the supplements that follow. The Kickstarter is therefore not an additional product, but a functional preparation for the rest of the supplement system.

Within the dog supplement category, this approach is exceptional. While many brands focus directly on symptom-oriented support, Fuzzies consciously introduces a sequence: **first the foundation, then targeted support**. This makes supplementation clearer for the user and increases the likelihood that it will actually be maintained over time.




The packaging also reinforces this principle. In a category dominated by plastic jars that often disappear into cupboards, Fuzzies opts for plastic-free cardboard canisters designed to be visible. They act as a daily reminder while also creating clear differentiation on the shelf.

When it comes to nutrition, Fuzzies makes clear choices. All supplements are grain-free and based on fish as the sole protein source. This supports digestibility, is suitable for sensitive dogs, and provides clarity for both consumers and retailers.

Fuzzies is developed by Johnson Petfoods, a family-owned company with extensive experience in premium pet nutrition and category development.

Fuzzies can be experienced at Interzoo in Nuremberg – Hall 3C, Stand 406.





World of wellness: in search of online pet supplements

Multivitamins might still lead the segment due to their convenience, but targeted, herbal and natural options for dogs and cats are increasingly sought after.



Victoria Mauriello
Principal, Consumer Goods & Retail
Similarweb



Amelia Leib
Head of Industry
Similarweb

Pet owners are changing the way they buy supplements. They are timing purchases around sales events, focusing on specific or functional ingredients rather than brand names and generally becoming much more selective shoppers. For businesses in this space, understanding these changes is vital.

Promotional window effect

While overall category search declined by 1.8% in the US in 2025 compared with the previous year, a closer look reveals that pet owners are getting smarter about

their purchases. Here's what the US data shows: pet supplement searches peak consistently in July and October. Search volume jumped 35,000 from June to July 2024, and grew even larger last year with a 45,000 increase from June to July 2025.

These aren't random months. July brings Amazon Prime Day, and October kicks off the fall promotional season. Many pet owners have simply figured out that, as supplements aren't really impulse purchases, they're happy to hold out for better deals.

This mirrors how people shop for other household essentials too. Supplements represent a commitment – both financially and to a pet's healthcare routine – so consumers exercise patience. What this means for brands is pretty clear: your promotional calendar matters enormously. Getting visibility during these peak windows can make or break your year. [▶ SEE NEXT PAGE](#)

Specificity of searches

Dog owners are clearly driving the momentum in the pet supplements category. The most sought-after products skew heavily toward dog-specific needs, with probiotics and fish oils (almost 4 million clicks each) plus yeast infection treatment (almost 3 million clicks, up a whopping 731.5% in a year) dominating search activity.

While cat owners are also exploring probiotic options, as well as amino acids, their share of overall engagement remains far smaller. This is an indication of just how strongly dog supplement searches continue to outperform those for cats in the US.

As ingredients like these target joint health and mobility, this pet consumer interest tells us something that's important for marketers to know: people are thinking ahead about their pet's long-term wellness rather than just reacting to problems as and when they arise.

Appeal of multivitamins

Total sales of supplements and vitamins for dogs at Amazon US in the period November 2024 to October 2025 were 18 million units, 5.7% up on the previous year. Multivitamins captured about 30% of category revenue share in the same period, growing slightly year on year. That's a massive lead over other subcategories such as herbal supplements, antioxidants and amino acids – and the reasoning makes sense. Pet owners want simplicity.

Rather than juggling several different bottles for joint health, digestion, coat quality and immune support, they'd prefer one product that covers everything. It's the same psychology that drives human multivitamin sales. People want comprehensive solutions without the hassle of complicated regimens. For busy households managing work, kids and pets, reducing decision fatigue is valuable.

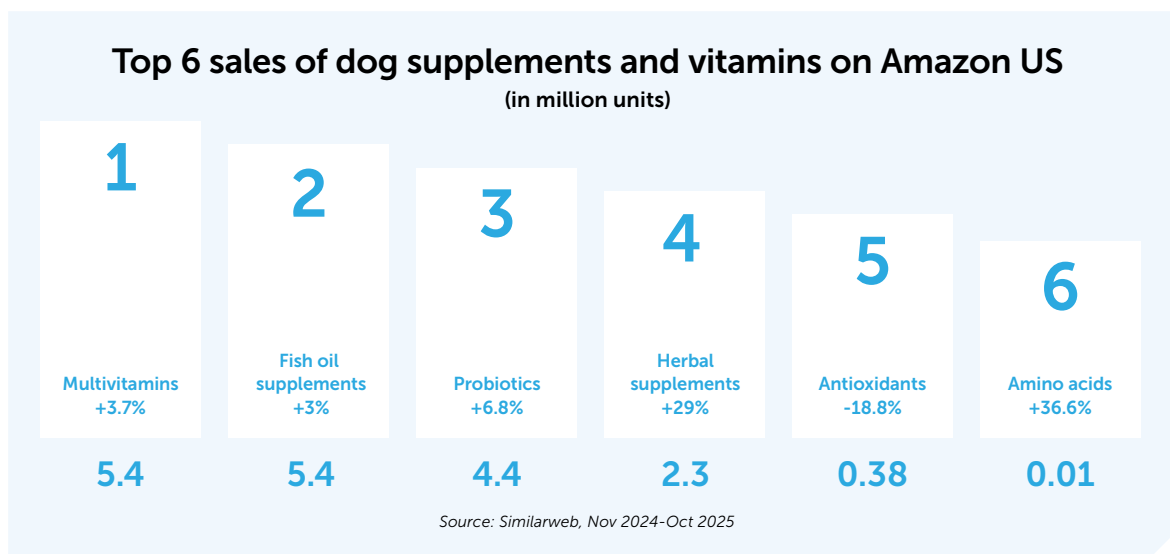
Single ingredient options

Here's the twist: while multivitamins dominate by volume, herbal supplements are growing much faster. We're talking about 26% revenue growth on Amazon, if you compare the period November 2024 to October 2025 to the same timeframe in the previous year.

This absolutely smashes the category average. Interestingly, we're seeing a huge revenue increase in the same period in the much smaller subcategory of amino acid supplements, up by 41.5%.

The surge in herbal supplements reflects a broader shift in the pet food industry toward natural, recognizable ingredients instead of more synthetic formulations. The top Amazon searches driving traffic to dog supplement listings very much prove this point.

Salmon oil, fish oil, probiotics – these are ingredient-specific searches from people who've already decided what benefit they want and are now hunting for the best





product to deliver it. They're not typing in brand names. They are searching for functional solutions. This represents a fundamental shift in shopping behavior that has major implications for marketing strategy.

Zesty Paws: successful SEO

A compelling case study is the US premium pet supplement business Zesty Paws. Despite revenue being down by about 5% year on year, the brand still controls approximately 10% of total dog supplement revenue on Amazon and drives impressive product page views. Its secret weapon? Mastering Amazon's search ecosystem.

While traffic to its own website has grown 30% annually, the company's real competitive edge shows up inside Amazon. Zesty Paws gets 47% of its clicks from Amazon's search function, compared to 42% for the category overall. More significantly, 73% of those clicks come from non-branded searches, terms like 'salmon oil for dogs' where shoppers are researching ingredients rather than seeking specific brands.

Rather than juggling different bottles for joint health, digestion, coat quality and immune support, customers prefer one product that covers everything.

Consumer search and product titles

Think about the opportunity that represents. When someone types 'fish oil for dogs' into Amazon's search bar, they're ready to buy but haven't chosen a brand yet. By optimizing product titles, descriptions and backend keywords for these ingredient-based queries, Zesty Paws positions itself as the solution to functional needs, rather than depending solely on brand recognition.

This strategy is then amplified through paid search, sponsoring placements for the same non-branded ingredient terms. The combined approach – organic optimization plus paid visibility – keeps Zesty Paws high on the radar throughout the decision journey.

The takeaway for competitors? Success in supplements increasingly depends on being found when consumers search for solutions, not just when they remember a brand name.

Wider wellness context

Pet supplements don't exist in a vacuum. They are part of a larger wellness movement reshaping the entire industry. This 'petification' trend shows up most clearly in the fresh food movement. Brands offering human grade, freshly prepared meals have seen dramatic growth.

Specialized companies like Smalls, Ollie and The Farmer's Dog have built substantial businesses on the premise that pets deserve better than just traditional kibble. Even Chewy has jumped in with its Get Real private label fresh food line.

The connection to supplements is straightforward. Consumers willing to invest in premium, natural food are equally open to supplement regimens that support long-term health. The same values driving fresh food adoption, namely ingredient transparency, natural sourcing and functional benefits, apply to supplements too.

This creates interesting opportunities. Fresh food brands can credibly expand into supplements, while supplement brands can leverage the wellness narrative that fresh food has normalized. The consumer feeding their dog freeze-dried raw food is the same person searching for wild-caught salmon oil and grass-fed beef organ supplements.

[▶ SEE NEXT PAGE](#)

Fresh food brands can credibly expand into supplements, while supplement brands can leverage the wellness narrative that fresh food has normalized.

Strategic priorities

Several clear actions emerge from this analysis. The first is to lead with ingredients rather than just brand messaging. Consumers are searching for specific functional ingredients, so clear communication about sourcing and efficacy matters.

Product pages should prominently feature ingredients, explaining why salmon oil improves coat health or how glucosamine supports joints.

Optimizing actual search behavior is key too. Brand building still matters, but discovery happens through ingredient and functional searches. Invest in keyword research around category terms and health benefit phrases. Target non-branded queries where shoppers haven't made decisions yet.

Brands in the US should concentrate marketing around Amazon Prime moments. Those July and October search spikes align with when consumers are actively shopping and receptive to deals. Focus advertising spend, promotions and inventory around these windows to maximize visibility when purchase intent peaks.

Companies can consider embracing natural formulations. While multivitamins lead in volume on Amazon, herbal and natural supplements grew by 29% in the period from November 2024 to October 2025, compared to the same period in the previous year. Product development should prioritize recognizable, naturally derived ingredients. Consider reformulations emphasizing clean-label credentials.

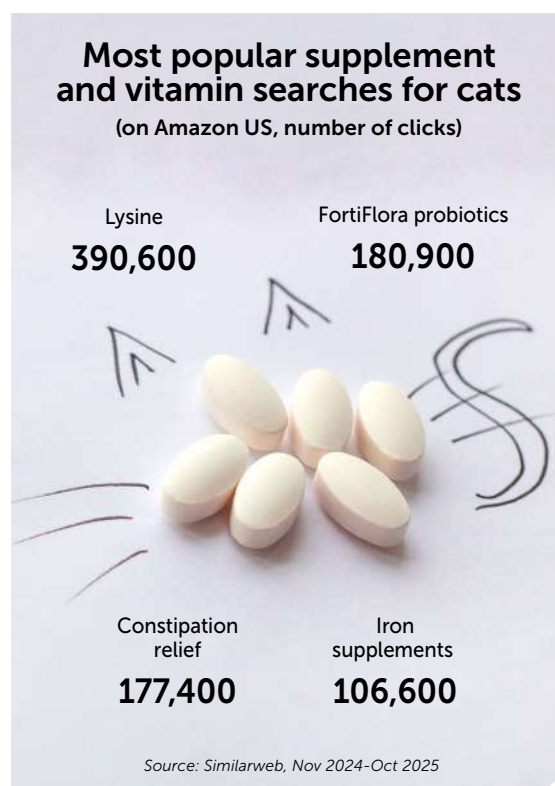
A final tip: simplify choices for consumers. Multivitamin dominance proves people value simplicity. Differentiate through targeted bundles, senior dog formulas combining glucosamine, fish oil and probiotics, or puppy packs supporting early development. Reduce decision complexity while maintaining the perception of comprehensive care.

A strong rationale for growth

The industry teams at companies like Mars Pet and Hill's Pet Nutrition view supplements as the next major growth frontier. The logic works. Fresh food addresses primary nutrition, while supplements allow personalized health interventions that feel premium and science backed.

Winners will be those that combine three elements – ingredient transparency that builds trust, search optimization that drives discovery, and formulations that deliver genuine benefits. In a category where consumers are willing to spend, but increasingly skeptical of hype, data-driven decisions about what to sell, how to position it and when to promote it will separate leaders from followers.

The pet supplement market may be stabilizing, but that stability reveals a more educated, ingredient-focused consumer base with clear preferences and predictable behaviors. For brands that can decode these patterns, the opportunity to capture meaningful share remains significant. ♦





Pet's Up UK

Novelty and nutrition: Pet's Up redefines dog treat innovation

The manufacturer and distributor identifies opportunities where other industries see little to no potential.

In an increasingly competitive industry, Pet's Up unravels untapped opportunities where others see waste. Sustainability and nutrition sit at the heart of its product philosophy.

The European company develops premium natural dog products by reimagining how underused byproducts can be transformed into functional, long-lasting chews.

Founded in 2001 as Lennox UK, Pet's Up began as a specialist in natural hide chews sourced from South America.

Over the past decade, the business has evolved beyond its roots, broadening its portfolio with innovative formats and nutrition-focused solutions designed to meet changing consumer expectations.

A fresh, sustainable portfolio

Chewllagen, a dog treat made from collagen extracted from South American grass-fed cattle hide, marked Pet's Up's first major product milestone. Produced using hydrolyzed collagen proteins, the

treat is formulated to support joint and digestive health, as well as cartilage regeneration.

The product was later introduced in a more premium format with the launch of the Chewllagen Bar. Combining beef collagen with added functional nutrients, the bar is designed to deliver extended chew time, alongside vitamins, minerals, antioxidants and glycemic support.

As part of its efforts to broaden its range using natural materials, Pet's Up began working with coffee wood in 2020, turning the often-discarded byproduct into a dog chew.

The resulting product, goodWood, is made from coffee wood sourced from Colombia. Free from calories and caffeine, the long-lasting chew is intended for pet owners seeking durable, natural chewing options for their dogs.

Since goodWood was launched during the COVID-19 pandemic, the product also supported job creation during a period of

widespread economic uncertainty.

Alongside its branded portfolio, Pet's Up also supports private-label customers, helping them expand their catalogs with competitively priced products developed using the company's manufacturing expertise.

Beyond borders

Headquartered in Essex, UK, and Oldenzaal in the Netherlands, Pet's Up has expanded its international footprint over the past decade. The company is now present in more than 20 European countries and continues to grow its operations in South America, particularly in Colombia and Chile.

Pet's Up is also active in international trade. In 2023, it was named Exporter of the Year at the Pet Industry Federation (PIF) Awards when it distributed over 35 pallets of product per month, marking a record level of exports. ♦

Pet's Up Products BV
petsup.co.uk



Are dietary supplements living up to their promise?

Despite widespread awareness of potential benefits, recent research shows significant variations in the use of this type of complementary pet nutrition across different countries.



Diana Dominguez
Business Reporter
GlobalPETS

A new survey by Yummypets, powered by Loop, among some 2,500 pet owners in France, the UK, the US, Canada, Brazil and Mexico reveals that just 30% of cats and 42% of dogs are given dietary supplements every day.

How often are supplements given?

Pet owners in North America are the most likely to give their pet a supplement every day (40%), followed by European owners (37%). But just over three out of 10 pet parents in Latin America (32%) administer this type of product on a daily basis.

The majority of pet parents give supplements between one and six times a week. This is seen the most among the respondents in Mexico and Brazil (36%). At the other end of the scale, 23% of all cat owners in the survey, and 14% of all dog owners, only give a supplement to their pets once a year or less.

Expected health benefits

Of all the benefits the respondents expect from a dietary supplement for their pet, the ones most mentioned are skin and coat health as well as

digestive health. These benefits are particularly valued among US pet owners, at 63% and 62% respectively. Digestive health is the most valued benefit in Mexico, at 60%.

General wellness and dental health also rank highly among pet owners' expectations, according to the survey. Brazilian (60%) and French (53%) owners have the highest expectations for general wellness, while dental health tops the list of expectations in the UK, at 51%.

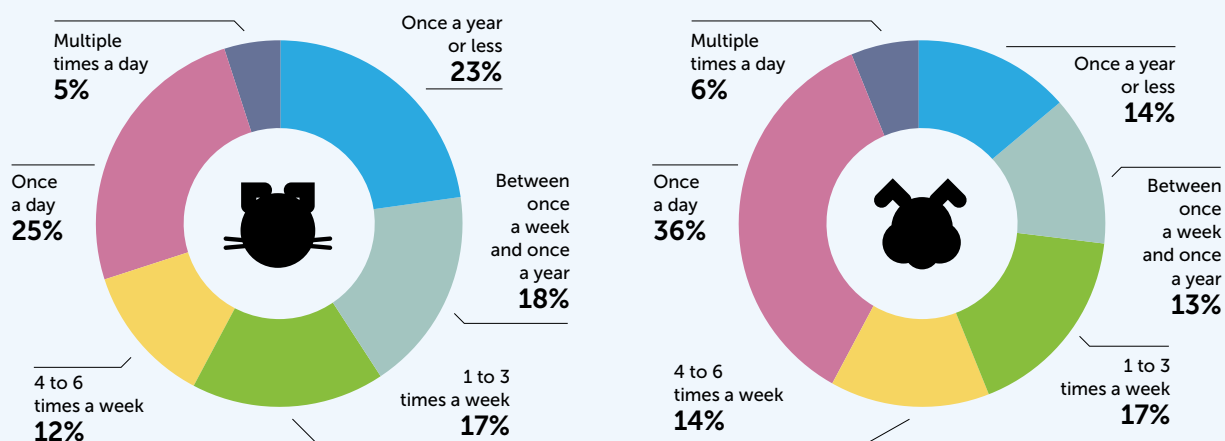
Generation X (aged 44-59) pet owners agree that these four benefits are why they use supplements. Meanwhile, Gen Z (18-27) pet owners are more likely to give supplements for stress, urinary health, appetite, cognitive health and, to a certain degree, heart health.

Canine vs feline wellness

There are significant differences between owner expectations of benefits for dogs and cats. Dog owners often use supplements for joint health (49%) whereas for cats this figure is just 21%. Cat owners see the urinary and kidney health benefits (33%), while this is of less interest to those who own dogs (13%). It's a known fact that cats can be difficult eaters, so unsurprisingly their owners use supplements for appetite stimulation (22%) more than dog owners (12%).

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Frequency of dietary supplement use in pets



Source: Yummypets-Loop (n= 2,486), July 2025

Preferred formats

While chews are the most preferred globally – particularly among dog owners (71%) – the survey shows that pet owners are open to other formats too. The second most popular for cats is liquids and pastes (both 43%). For dogs this is tablets (42%).

Preferences differ in global regions and among subgroups. For instance, Latin American and Gen Z pet owners are more likely to give pastes to their pets, while North American, female and millennial (those aged 28–43) pet owners prefer powders. In Europe, pet owners are more likely to give tablets, while male North American pet owners favor chews.

Mix to taste

In terms of administration, 65% of all cat owners mix dietary supplements into wet food, while 39% do so with dry food. Other methods for cats include placing directly in the mouth (30%) and spreading on a treat or coating it (27%). Some 17% of the respondents mix supplements with water or other liquids to give to their cats.

Dog owners also mostly administer a dietary supplement by mixing it with wet food (49%) or dry food (51%), while 40% directly place it in their pet's mouth. About three in 10 of them add the supplement to a treat in some way, while 15% give it to their dog mixed with a liquid.

Expected benefits from supplements given to cats and dogs*

52% Skin and coat health



52% Digestive/gut health



51% General wellness



44% Dental/oral health



38% Immune support



Source: Yummypets-Loop (n= 822), July 2025

*Multiple responses allowed

Positive feedback

Globally, more than eight in 10 (81%) cat and dog owners believe their pets respond positively when given supplements. About one in seven (14%) say their pets respond neutrally, while 5% say they get negative reactions.

The survey noted no differences in the observations of subgroups, except that cat owners notice more negative reactions overall (8% vs 4% for dogs) and women do too (8% vs 1% for men). ♦

Top 3 formats given to pets in the previous 12 months

1
Chews
(71%)

2
Tablets
(42%)

3
Powders
(35%)



1
Chews
(54%)

2
Liquids
(43%)

2
Pastes
(43%)

Source: Yummypets-Loop (n= 822), July 2025



Fawaz Alenzi, Group CEO & co-founder, Petzone

“Opening retail stores in Saudi Arabia is the logical next step”

The Kuwaiti multichannel pet business is targeting expansion in its neighboring country, while also growing in the UAE and entering the Qatari market.



David Palacios Rubio
Editor-in-Chief
GlobalPETS

A regional success story, Petzone has grown from a single retail store into a multi-country pet business, now operating across Kuwait, the UAE, Bahrain and Saudi Arabia. The company combines traditional shops with a leading e-commerce platform and a wholesale B2B distribution network serving nearly 1,000 customers.

Building on this momentum, the retailer has plans to grow even further. CEO Fawaz Alenzi shares his insights on retail expansion, telling PETS International about the need to meet the demands of increasingly knowledgeable pet owners across the Gulf region.

You founded Petzone nearly 15 years ago. How do you think the regional pet market has changed since then?

Back in 2010, the business was completely different. At the time, cultural restrictions very much dominated the consumer mind and therefore consumer behavior too. But since COVID, we are in a completely different era and pet parents care more about their pets. That's why we are seeing more interest in super-premium and holistic products compared to before the pandemic.

Are pet parents more knowledgeable now?

In the UAE, you have a lot of expats who really care about their pets and now know more about pet products and services. In the Gulf nations, pets were not part of the family – or the general lifestyle – back in the '80s, '90s, or even early 2000s. But we're now seeing a huge shift.

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Looking at the consumers in Saudi Arabia, the UAE or Kuwait, they're definitely more knowledgeable now because of the internet. They can search and find a lot of information online about any product. So things keep changing for the better, with every day different to the previous one as you see more educated consumers in the region.

How would you describe your store network?

Most of our stores are in Kuwait – more than 30 nationwide, including the 'shop-in-shop' concept models. We also have three megastores in Dubai, UAE and Bahrain. Our regular stores are typically between 500 and 1,500sq m. The idea is to have a few megastores while continuing to focus on small stores between 100 and 300sq m.

What would you say are the main differences between the various countries in terms of assortment?

To succeed, you need to maintain 8,000-10,000 SKUs at all times. Because we run a retail business, we must have all categories and well-known brands – whether we import them directly or buy them locally from partners. In general, the countries we operate in share a similar mindset and product offerings.

In Saudi Arabia, however, economy brands are more popular than in other markets. In countries like the UAE, I think inflation will affect businesses, and many people might become more price driven. But in the end, many people still care more about quality than price.

And the local brands?

I don't believe they are managed well enough to have any effect on the market yet. So working with well-known imported brands will remain the driver of this business. I can see local manufacturers achieving a small market share, but the current quality of their products and business strategies would need to change. I don't think they can survive in the long run unless they massively improve their production facilities.

In which Gulf markets do you see the most opportunity to do business?

We have more room to expand in Saudi Arabia, the UAE and Qatar. In the coming years, expanding our retail and wholesale business there will be a huge focus for us. Recently, we started working with global supply

chain partners to set up a centralized warehousing hub in the region. Specifically, we already opened one in Dubai and are looking to establish another in Saudi Arabia.

From this hub, we can serve our own demand in each country and ship internally to other markets where we operate. That will enable us to optimize supply chain costs and availability, resulting in greater profitability in the long run.

How do you envision expanding your footprint in Saudi Arabia?

The market is currently flooded with pet stores, with more than 1,000 locations and intense competition. There is also a major price war that is shrinking margins there, and I believe many of those small businesses will eventually close.

Expanding into Saudi Arabia with a retail presence is in the pipeline, as we aim to complete our portfolio. We believe that the retail business will complement and further boost our distribution operations.

We're already active in Saudi Arabia as a distributor, importing and selling to many customers with strong results. Launching traditional retail stores is a logical next step, especially given the positive performance of our online business there.

What is the downside of a competitive market such as Saudi Arabia?

It's difficult to compete with those huge numbers of pet shops, so we need to be careful. Simply jumping in and opening stores is not a smart idea when the market is so immature. If you ask anyone in Saudi, you'll hear stories about cashflow problems, less store traffic and businesses closing.

I think sooner or later we'll move into a filtering out phase, with a lot of small stores closing in all markets – especially Kuwait, Bahrain, Saudi Arabia and Qatar.

"We are working on a centralized omnichannel loyalty program for offline and online, to support the complete customer journey."

This will give the main players plenty of room to dominate the scene, possibly taking a 60% share, while small players may well disappear within 10-15 years.

How many stores would you like to open there?

I believe opening around 30 stores in Saudi Arabia would be logical in a 10-year plan. But no more than that. Our specific type of megastore is very costly to open. Online competition means that brick and mortar is not like it was before. So balancing online and offline is also very logical. The plan is to start gradually, opening stores in major cities to test the market.

Is this something you're planning for 2026?

We have serious plans to do so, specifically in the UAE, Saudi Arabia and Qatar. Currently, we're working on big projects as part of the decentralized warehousing concept, focusing on technology and the supply chain. For example, we recently upgraded our CRM and moved to SAP ERP. This should all be in place quite soon, and then we can move forward. Opening more retail stores is likely in 2026.

"Our sales are split between 65% offline and 35% online, which we believe is the ideal mix at this stage in our markets."

How does online and offline consumer purchasing behavior compare?

The pet online channel is valued at approximately \$1.2 billion (€1B) in the Gulf region and is competing aggressively with traditional offline stores. In our case, we aim to maintain the right balance. Currently, our sales are split between 65% offline and 35% online, which we believe is the ideal mix at this stage in our markets and reflects the success of our omnichannel approach.

What is the role of quick commerce in the region?

We work with q-commerce and on-demand marketplaces in all the countries we operate in. Online traffic is huge there, but we cannot list everything on the platforms because they are dedicated to quick delivery and different types of customers. It is, however, important to participate and get that market share.

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Cutey

Happiness begins in her bowl

The advertisement displays a variety of Cutey cat food products, including pouches, tins, and dry food bags, alongside a plate of wet food. The products are arranged on a green grassy surface. The Cutey logo is prominently displayed on the left and right sides of the top section.

ORINEX شركة أورينكس
ORINEX COMPANY

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Is there competition from traditional retailers such as supermarkets and grocery chains?

Consumers go to the mass market to buy home groceries – also essential pet products, mostly economy range. You'll never find super-premium products in supermarkets. For those you have to go to a specialty shop. There is definitely a big difference between the channels, but we don't see that as a threat because traditional retailers are targeting different types of customers. In fact, I think they complement each other.

How are new categories such as plant-based, vitamins and supplements performing?

The Middle East market still focuses on the traditional pet food concept. New approaches like plant-based and freeze-dried are still just a small part of the business, and we don't see any demand for them. It is good to follow global trends, but I believe it is too early to introduce these categories into our markets.

All pet stores should stock vitamins and supplements. But unfortunately we are faced with a lot of local restrictions and regulations. Authorities often consider the products medicinal, so import and registration are a complicated process requiring a number of licenses. This makes it very difficult to sell multivitamins and supplements. And generally they account for only about 5% of the business.

Is there much variation between customer journeys and basket sizes per country?

In markets like Qatar and Kuwait, spending tends to be higher, while in Bahrain and the UAE it's somewhat lower. On average, basket values range from around \$60 (€51) to \$70 (€60), although this can fluctuate due to economic and cultural factors.

What about frequency?

We expect to see the customer frequently, more than 10-12 times a year. Our sales team connects well with our customers, knowing them by name, and this builds trust and long-term relationships.

Whether they come to the store or buy online, they are loyal to the brand. We engage with thousands of customers, which is why we are working on upgrading our CRM software to always be able to connect with them perfectly.

Tell us more about your loyalty program...

We run different types of loyalty programs in different countries. I believe this is a must now. We are working on a centralized omnichannel loyalty program for offline and online, to support the complete customer journey. Whether they visit a physical store or order online, whether they buy products or services, they should still get the same benefits. We are expecting solid results very soon.

How is Petzone harnessing the power of AI?

In the online channel, we are already working on upgrading the system into a specific AI integration concept. This is ongoing and we expect to finalize it soon. We are already testing some types of AI on our websites in all our markets.

What is your vision for services?

We offer our customers a lot of different services, such as relocation, grooming plus mobile grooming, aquarium maintenance and events – for example birthday celebrations. We certainly believe that services like these are very important as they complete our offering for pet parents. ♦

Pet retail revolutions in the UAE and Saudi Arabia

As the younger populations of the Gulf states become more plugged in to global innovation, they have an increasing interest in securing what's best for their pets.



Katy Gillett
Contributor
PETS International

The Middle East pet care sector, once dominated by small independent shops and limited ranges, has undergone a radical professionalization. Today, the six countries of the Gulf Cooperation Council (GCC) represent one of the fastest-growing pet markets globally, and consumers can benefit from more specialized products, care and advice.

The UAE: essentials and solutions

As pet ownership has surged by roughly 30% since the pandemic, the pet retail industry in the UAE has evolved into a fully developed category of products and services, featuring organized merchandising and specialized ranges. Amr Hazem, CEO of UAE retail group The Petshop, notes two dominant shopping missions.

The first is the replenishment shop, where customers restock essentials for their pets, such as food and litter, and then add extras such as treats, hygiene products and toys. "These trips and orders are routine-led and convenience-driven," Hazem says.

The second is a solutions-led shop, where pet owners buy around a desired outcome, such as digestion support, skin comfort, dental care, anxiety relief, healthy weight, mobility and enrichment. "These baskets naturally span multiple categories, because customers are building a routine, not just purchasing a single product," he adds.

Enrichment and training products

Overall, customers in the UAE are increasingly benefit-led and label-aware, and are beginning to ask more detailed questions about suitability, ingredients and how products fit into daily care. While the best-performing categories are dry food for dogs and cats, wet food for cats, and treats – especially training and functional varieties – there is also strong demand for litter products, as well as parasite control, basic grooming and other hygiene-related items.

"A notable growth area is enrichment and behavior-led supplies – toys, chews, puzzle feeders, scratchers, calming and routine-support tools – as more owners prioritize quality of life at home and practical solutions that reduce household stress," says Hazem.

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Wraparound support

Customers are now increasingly seeking 360-degree services from retailers, and The Petshop can provide that. “Our teams stay close to the community, support responsible pet ownership and help families make informed choices about nutrition, healthcare, grooming and lifestyle for their pets,” says Hazem.

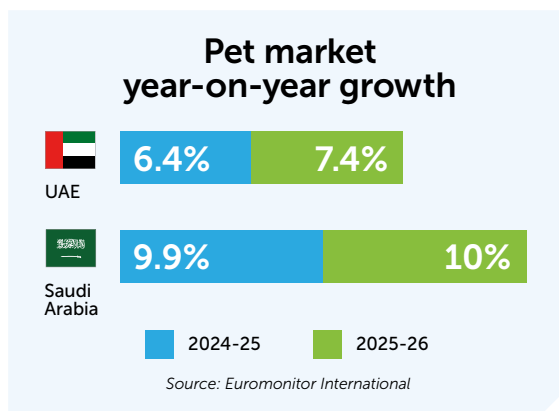
This philosophy has birthed a digital-first landscape where convenience is king. The Petshop was the first to offer 60-minute delivery across Dubai, Abu Dhabi and Sharjah, seeing double-digit month-on-month growth for this service since it started. It also led to the launch of its app, that allows customers to shop, access a loyalty program and book services such as boarding, grooming and pet relocation.

Saudi Arabia: new cat-loving generation

The Saudi market, meanwhile, is defined by a younger, globally connected population – with a median age of just 29.6 – that is moving past traditional hesitations toward pet ownership.

Nawaf Tabbaa, Chief Marketing Officer at Saudi pet products supplier Muntajat, believes this generational shift will drive the growth of pet retail. In Saudi Arabia, cats dominate with 82% market share.

According to Tabbaa, the current average order value among Saudi customers in physical specialty stores is \$32 (€27.50), with e-commerce orders reaching \$53.33 (€45.84) and q-commerce hitting \$39.99 (€34.38). Pet-related supermarket orders are much lower, at \$13.33 (€11.46).



In the UAE, the future lies in one-stop ecosystems – super-apps that integrate retail, veterinary care and grooming into a single digital interface.

Tabbaa warns of a volatile product landscape, with “fake brands” coming in from Turkey and China – often disappearing as quickly as they arrive – which he believes creates instability in consumer perception.

There’s also the fact that some local consumers choose low-cost products over high quality. “In Saudi Arabia, [we] do not have the habit and culture of reading labels and understanding what’s good and what’s bad in terms of ingredients,” he notes.

Toward higher quality brands

One of the ways Muntajat is combating this issue is with its ShipGo dropshipping model, launched in 2024, which allows retailers to sell high-quality brands on their websites and effectively acts as a quality gatekeeper for the market. It also lets new e-commerce businesses enter the pet market without holding inventory. In its first year, 25 new businesses started using the service.

In addition, there’s also a new wave of local manufacturing. Felyn Go and Canine Go are local sister brands with affordable pricing and high-quality ingredients that have taken the market by storm since their launches. They are available at specialist retailers nationwide, with their ranges spanning wet and dry food, treats and milk – all grain free – plus a raw products line.

Meanwhile, Delicious Food Factory in Saudi capital Riyadh is set to become the largest pet food factory in the Middle East by late 2026, with an annual production capacity of 60,000 tons of dry food and 40,000 tons of wet food.

Balancing showrooms and dark stores

Within both Middle East markets, the role of physical versus digital channels is still being navigated by local players. In Saudi Arabia, e-commerce sales reached \$50 million (€43M) in 2024, more than double the previous year, according to Tabbaa.

Global giants, such as Amazon, and local q-commerce leaders, like Ninja, are capturing significant market share. Ninja alone accounts for 8-10% of sales. There are also new players, for example Keeta, which is expanding aggressively and aiming for 130 dark stores by mid-2026.

Physical retail is not vanishing in Saudi Arabia though. Muntajat is currently expanding its B2C footprint, with showrooms that have a minimum size of 1,500sq m. Tabbaa argues that these branches are essential for brand experience. "Having a physical store is always a better choice for people who want to experience the brand, who want to understand [the benefits] and have one-on-one talks with our nutritional consultants."

The showrooms serve as strategic hubs for delivery. "Our strategy is to keep going with retail stores and then use them as dark stores," Tabbaa says, referring to using physical locations as localized distribution centers to solve the 'last mile' delivery challenge in cities where there is, as yet, no q-commerce.

Omnichannel is the norm

While online plays a strong role in the UAE too, stores remain essential, "because pet care is still a high-trust category", Hazem says. He adds that proprietary online channels, including The Petshop's app, are used the most for planned replenishment and repeat purchasing, while third-party delivery platforms are typically used for urgent top-ups and convenience.

"This is also why we've invested in keeping delivery capability in-house," Hazem explains. "It gives us better control over the customer experience end-to-end, from product availability through to fulfillment standards." Being omnichannel is non-negotiable now, says Hazem: "Customers will discover something in-store, replenish online and receive it quickly, with a consistent experience across touchpoints."

Overviews and outlook

While the UAE is a hub for international concepts, and currently has the most sophisticated market in the region, Saudi Arabia offers the greatest scale for growth. The competitive landscape is diversifying. Even non-specialized retailers such as Nahdi (pharmacies) and eXtra (electronics) are entering the



pet supply space, alongside general supermarket chains, who are expanding their pet-related lines in parallel with the local market.

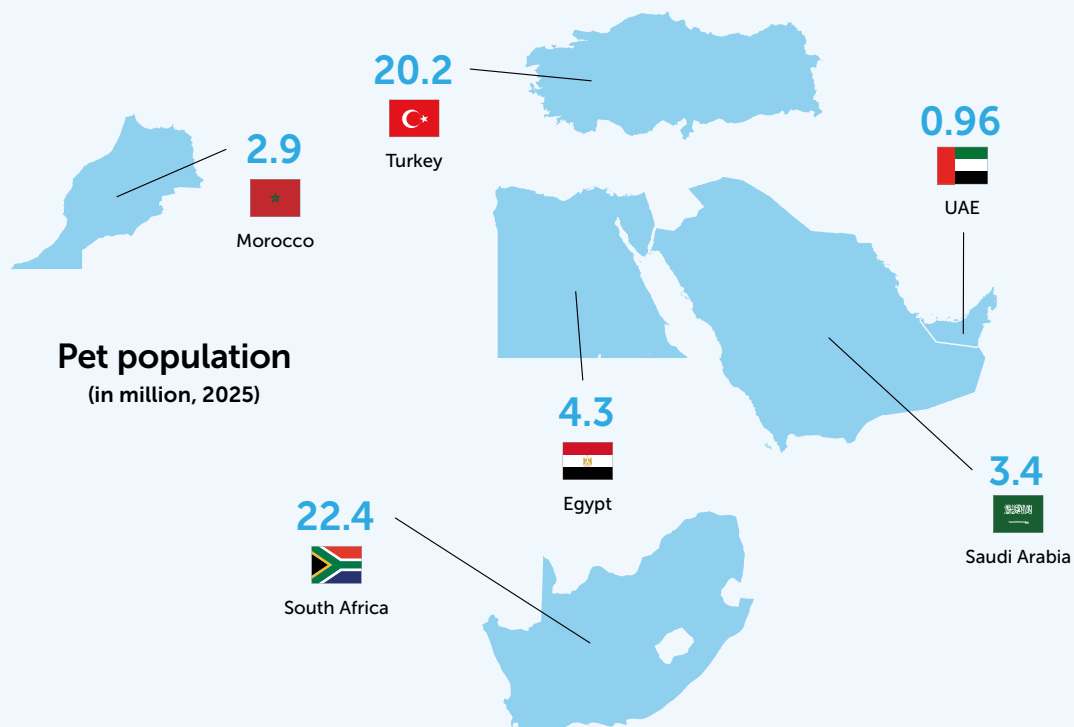
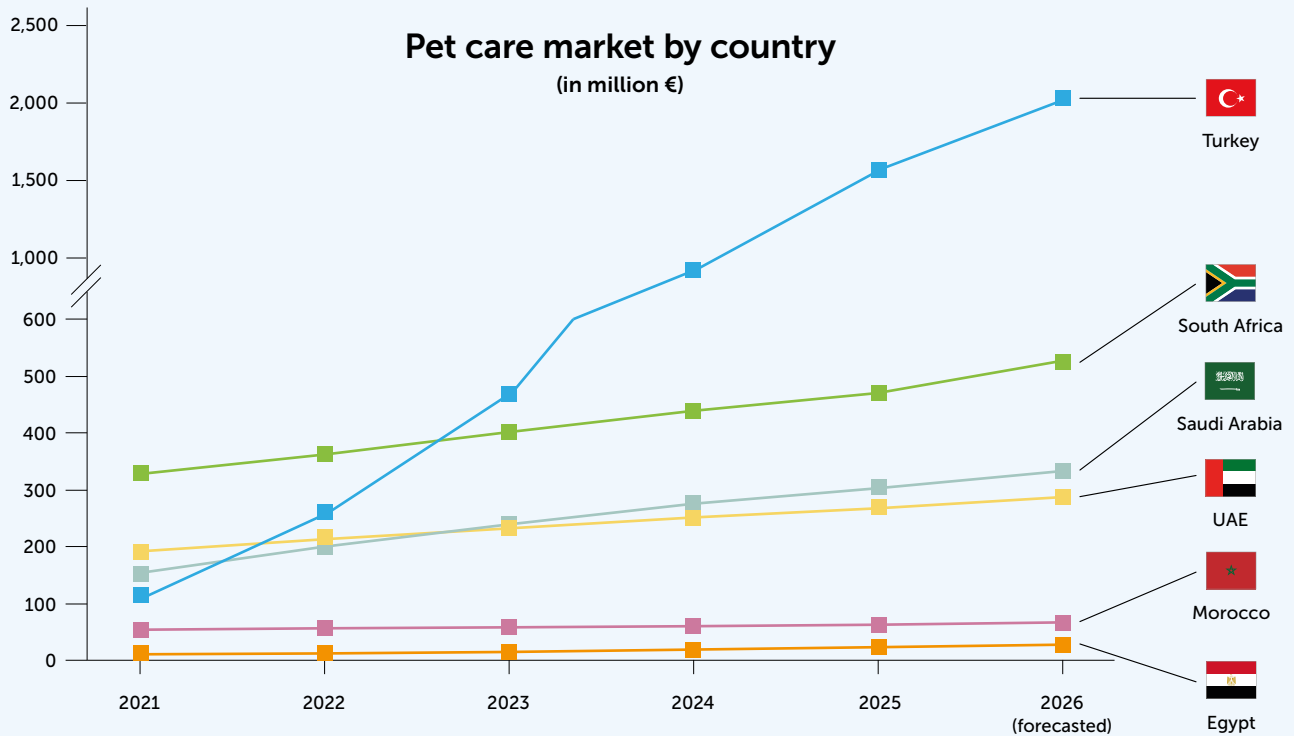
The industry still faces hurdles, including rising regulatory costs and a need for better animal welfare infrastructure, but the overall trajectory is upward. In the UAE, the future lies in one-stop ecosystems – super-apps that integrate retail, veterinary care and grooming into a single digital interface. In Saudi Arabia, the focus is on education and shifting the culture toward quality.

According to Hazem, the whole pet ecosystem in the UAE "has grown up", with more players in the sector, such as veterinary hospitals and daycare. "In many ways, we are still at the early stages," he says of the market.

"Pet ownership in the UAE is lower than in some Western markets, which means there is plenty of room for responsible growth. At the same time, the industry here is professionalizing quickly – with clearer standards, stronger regulation and more structured, long-term businesses," he concludes. ♦

Proprietary online channels are used the most for planned replenishment and repeat purchasing, while third-party delivery platforms are typically used for top-ups.

Pet industry snapshot: Middle East, Africa and Turkey





Country report: Turkey

Cat-centric pet economy presents opportunities

As the nation's owners embrace omnichannel and wellness trends, Turkey's pet care market is coming of age – quietly, steadily and with a distinctly local rhythm.



Thuyen Vu
Chief Marketing Officer
TGM Research

In a country with a population of around 86 million and ranking in the top 20 world economies, three key trends are shaping Turkey's pet market in 2026. Firstly, pet ownership is stable, with cats the dominant segment. Secondly, pet care is shifting toward boosting health through preventive strategies at home. And finally, although online is now the leading channel for pet food purchases, supermarkets and veterinary clinics are maintaining trust.

A stable ownership base

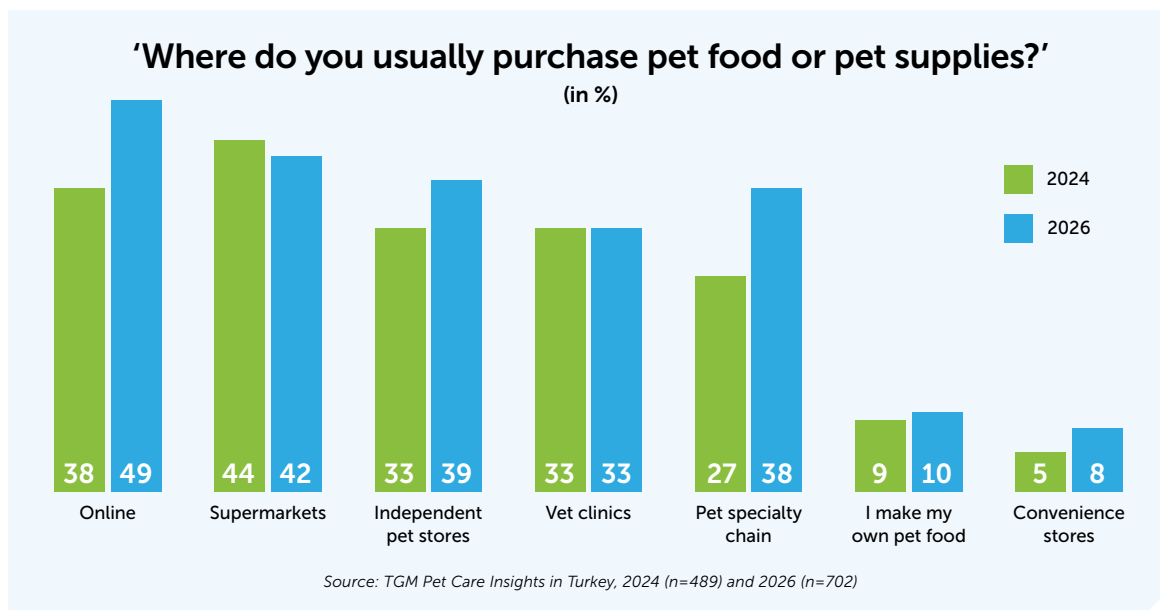
Turkey's pet culture stands out for its consistency. Most households have a single pet, although multi-pet

ownership is slowly gaining ground. In 2024, 64% of owners reported having one pet; in 2026, that figure has dropped to 59%, while multi-pet ownership has risen modestly from 36% to 40%.

That sits alongside a consistently deep sense of emotional attachment in everyday life. Today, 39% of Turkish pet owners describe their pet as a "family member" and 42% say they are a "companion" – the highest level recorded across the 2024-2026 period.

Similarly, the number of owners who perceive their pet as a "baby/child" has climbed to 25% from 21% in 2024. But this is not a story of accelerating pet humanization. Instead, Turkey reflects a market where humanization has plateaued at a high level. Pets are not becoming family – they already are.

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Cats consolidate popularity

If one characteristic unequivocally defines Turkey's pet economy, it is being a cat-first market. While cats were already the most owned pet in 2024, present in 55% of single-pet households and 66% of multi-pet households, their dominance has intensified. In 2026, cats feature in 70% of single-pet households and 78% of multi-pet households.

Dogs remain in second place, but the sizable gap is further widening. At the same time, multi-pet households are becoming more diverse. Fish remain the third most common pet, present in 23% of multi-pet households in 2026. In other words, while cats remain the household anchor, secondary pets are increasingly being added.

For brands, the implication is clear: strategies designed primarily around dogs may not fully translate. Turkey's most compelling growth opportunities lie in feline nutrition, hygiene, grooming and enrichment.

Over 60% of Turkish pet parents say their costs increased over the past year and they expect spending to rise further over the next three years.

Prioritizing preventive care

Pet health remains essential in the market. As of 2026, regular veterinary visits were the most widely used wellness service in the past 12 months, with 54% of owners reporting ongoing care.

The more notable shift, however, is happening at home. Rather than relying solely on professional services when issues arise, Turkish pet parents – and especially cat owners – are increasingly investing in grooming and hygiene products, as well as supplements.

The trend towards a more preventive care mindset is strongest among 25- to 34-year-olds, who are comfortable with handling routine care themselves and show a growing interest in targeted, specialized wellness solutions.

As a result of these everyday habits around grooming, supplementation and maintenance, preventive care – once a secondary activity – is becoming mainstream.

Spending expectations

Spending continues to rise, and expectations of future growth are widespread. Most owners now report

This is a market where the most compelling opportunities lie in feline nutrition, hygiene, grooming and enrichment.

monthly pet care spending in the \$21-\$40 (€18-€34) range, with a growing share comfortably spending \$41-\$60 (€35-€51) or even \$61-\$80 (€52-€68).

More telling than current spend is sentiment. As of 2026, over 60% of Turkish pet parents say their pet care costs increased over the past year and that they expect spending to rise further over the next three years.

This reflects more than inflationary pressure – it signals a reprioritization. As pets remain emotionally central, owners are increasingly willing to invest in better nutrition, preventive health, skin and coat care, and enrichment. Turkey's pet care market is not just expanding, it is upgrading on the back of elevated expectations.

Online becomes channel leader

Where Turkish consumers buy pet products is evolving almost as quickly as what they buy. Between 2024 and 2026, online pet food purchasing has risen from 38% to 49%, making e-commerce the leading channel.

Supermarkets remain highly relevant, though their share has dipped slightly from 44% to 42%. Meanwhile, veterinary clinics hold steady at 33%, underlining their role as trusted authorities, particularly for health-related purchases.

For brands, this creates a new reality. Turkey is becoming decisively digital, yet trust remains distributed across familiar, physical touchpoints. Winning strategies will not be 'online-only' or 'offline-first'. They will be omnichannel by design, using digital platforms to offer pet owners opportunities for discovery and convenience, while reinforcing their credibility through clinics, supermarkets and specialty pet retailers. ♦



Regional report: North Africa

A fast-growing region with untapped potential

Despite a lack of comprehensive data, industry experts anticipate the pet market in this area expanding significantly beyond traditional retail in the coming years.



Bianca Carrera
Contributor
PETS International

Population trends in North Africa have created a demographic of young, urban consumers who are increasingly aware of modern pet care practices. And despite many logistical and regulatory obstacles, the emerging markets on the continent are working hard to meet the demands of pet parents.

Egypt: corner shops and economy brands

Egypt is emerging as one of North Africa's fastest-growing pet care markets. According to Euromonitor, retail sales rose sharply from €10.5 million (\$12.2M) in 2021 to an estimated €23 million (\$26.8M) in 2025.

The 2026 forecast is for this to hit €27.4 million (\$31.9M). With an increasing pet population, over 4.2 million in

2025, this reflects a gradual shift from informal pet ownership towards more commercialized care.

Despite the growth of the retail market, Egypt's pet supplies sales remain predominantly offline. Most pet food and basic accessories are still purchased from independent neighborhood pet shops, veterinary clinics and supermarkets. It is believed that small local grocers represent more than 50% of sales by value. These outlets typically focus on mass-market and economy brands and offer limited product varieties.

Payment in cash preferred

According to online pet retailer Pawsket, certain structural characteristics of the market continue to reinforce offline purchasing. Cash on delivery remains the dominant payment method, reflecting limited card penetration and consumer preference for in-person or pay-on-arrival transactions.

This payment behavior, combined with high price sensitivity and delivery issues in congested areas, slows the transition to e-commerce and keeps traditional retail channels central to the market.

Founded in 2019, Pawsket claims to be Egypt's first and largest dedicated online platform for pet supplies. It offers more than 2,000 items across roughly 100 brands, spanning dry and wet food, treats, accessories, grooming and healthcare supplies.

A feline-centered market

Cats dominate Egypt's pet landscape – both demographically and commercially. Euromonitor data shows that, by 2025, they represented over 60% of the national pet population, a trend clearly reflected in purchasing behavior. Amir Elshazly, co-founder and CMO at Pawsket, tells PETS International that around 70% of the orders received in 2025 were cat related. Average basket value across the platform typically ranges between €19 (\$22) and €25 (\$29).

Cat parents usually purchase two to four items per order, with strong repeat behavior on a monthly or bimonthly cycle. These orders are driven by frequent purchases of essentials such as dry food, wet food and litter. Dog orders, while lower in volume, tend to include higher-value items such as larger food packs, accessories, supplements and grooming products.

Shifts in consumer behavior

According to Elshazly, the growth in purchases on the platform is mainly driven by urban middle-class households in Greater Cairo – home to more than 23 million people – as well as younger owners (22-35 years old), dual-income professionals and expats who, he says, tend to purchase higher quality imported brands.

Wider adoption appears to be the main driver of Egypt's strong year-on-year growth, even as consumers adjust spending behavior in response to a succession of economic shocks over the past few years. These include multiple currency devaluations, inflation rates that peaked above 30% in 2023, and recurrent foreign exchange shortages. All of these have limited purchasing power and reshaped consumption patterns across non-essential sectors, including pet care.

Cats dominate Egypt's pet landscape, with data showing that they represent over 60% of the pet population, a trend clearly reflected in purchasing behavior.

The search for better value

"Customers are shifting from premium to mid-range and economy brands," says Elshazly. Imported premium brands such as Royal Canin and Hill's remain popular, but buyers are increasingly substituting them with more affordable alternatives. Some of these brands come from Turkey, due to geographic proximity and lower price.

Elshazly also points to growing interest in local value brands such as Alpha, Happy Tails and Aleef, which have expanded rapidly on the back of affordability and stronger availability compared with imported products. Alpha, produced by domestic manufacturer ABA Pet Food, is one of the most widely distributed local brands and focuses on entry-level dry food for cats and dogs.

Aleef similarly targets price-sensitive consumers, with larger pack sizes designed to appeal to multi-pet households. Happy Tails sits slightly higher on the value spectrum, combining accessible pricing with a stronger focus on nutrition and ingredient quality for urban consumers.

There are structural challenges that limit these brands' growth. According to Elshazly, local producers continue to have problems accessing high-quality raw materials – particularly protein inputs, which are largely imported. Manufacturing and packaging standards also vary widely, so it's hard for a brand to deliver the consistency required for premium positioning.

As a result, most domestic brands remain focused on volume-driven, entry-level products rather than functional or veterinary diets.

Morocco: steady consumer evolutions

Pet retail sales in Morocco were estimated at €62.5 million (\$72.8M) in 2025 and projected to grow steadily at around 4-6% in 2026. This moderate expansion reflects a market where commercial pet food is already widely adopted,

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particularly through mass retail channels. Supermarket chains such as Marjane and Carrefour (operated by Groupe Label'Vie) dominate the retail landscape in the country – and that includes pet supplies.

According to the USDA Foreign Agricultural Service's 2025 Retail Foods Annual report, Marjane Holding is still Morocco's leading modern food retailer, followed by Groupe Label'Vie with its Carrefour stores. The Conseil de la Concurrence, the country's competition authority, estimates that these supermarket chains covered a total of about 60-70% of the retail market in 2024.

Online purchasing gains

Within this established retail landscape, consumer behavior is gradually evolving. According to online pet retailer Wiggly, more engaged pet owners – especially in major urban centers such as Casablanca, Rabat, Tangier and Marrakech – are increasingly turning to specialized pet stores and e-commerce platforms.

Wiggly launched in Morocco in 2023. It offers a wide range of products – from branded dry and wet food plus treats, to grooming and healthcare items and accessories such as bedding, toys, collars and harnesses. The platform's founders say that the channel caters to consumers seeking greater variety, personalized guidance and access to international brands that are not always available in supermarkets.

Most domestic Egyptian brands remain focused on volume-driven, entry-level products rather than functional or veterinary diets.

Cat vs dog spending

As in Egypt, cats make up the majority of Morocco's pet population – approximately two-thirds of all pets, according to Euromonitor. This demographic balance translates directly into consumption patterns, with cat owners generating the highest volumes and the most repeat purchases while dog parents tend to drive higher spending per pet.

According to Wiggly, a single dog-related order often consists of food plus several complementary products, such as supplements, hygiene products, training accessories and essentials like leashes and beds. Cat-related orders are more often focused on core essentials, such as food, litter and basic accessories.

"In terms of trends, we are seeing a gradual but clear interest in more specialized products, including formulas positioned as natural, functional or adapted to specific needs like digestive sensitivity, indoor cats and sterilized pets," Wiggly's representatives explain.

They add that many customers tend to purchase the same brand of pet food when it's available. "Well-established international brands such as Royal Canin, Oxnat and Hill's perform consistently on the platform, particularly within their core nutrition ranges for cats and dogs."

Issues affecting imports

Wiggly's founders point to several structural factors that limit the number of new international pet food brands allowed to enter Morocco. Regulatory requirements from the National Office of Food Safety (ONSSA), such as the health

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certificates and traceability documentation required for importing pet food ingredients, add complexity and cost to bringing products into the country.

Another problem that smaller e-commerce platforms and importers encounter is the minimum order quantities demanded by overseas manufacturers. This makes it harder for them to bring in a broader range of SKUs to sell at the competitive prices offered through larger distributors.

The income from the import charges themselves, which include freight, tariffs and clearance at major ports such as Casablanca and Tangier, explains why Morocco remains heavily reliant on imported pet food, with the country bringing in roughly €101.4 million (\$118.4M) worth of pet food in 2022.

Emergence of local brands

Because of all these constraints, there is now growing interest in expanding local pet food production, both to improve price accessibility and to enhance supply stability. However, the number of local producers is still small compared to imported products, and local brands often compete on price rather than with premium positioning.

A few enterprising Moroccan players have already emerged. An example is the agricultural cooperative COPAG investing in a local line of dog food under the Jaouda/Aydi brand. And the Aliments et Protéines du Nord group near Tangier produces dog and cat croquettes marketed through specialized channels.

Wider North Africa: seeking out opportunity

While Egypt and Morocco serve as the primary anchors for the North African pet industry, the surrounding region – particularly Algeria, which has one of the highest GDPs on the continent – offers a landscape of untapped potential and represents a regional shift that is finally rebounding after years of trade restrictions.

Despite logistical and regulatory obstacles, plus a lack of detailed market research, North Africa has some of the most resilient emerging economies in the world.

However, many of the North African countries remain a statistical ‘black box’. The lack of centralized data for these emerging markets is a significant hurdle that first needs to be tackled to understand the scale and nature of the pet market.

Libya’s persistent institutional fragmentation, and its lack of coherent governance and regulatory frameworks, have long restricted the country’s ability to engage efficiently with broader supply chains beyond the oil sector.

This situation would also shape the development of niche markets such as pet care. In Mauritania, the agro-pastoral sector – particularly livestock – dominates economic activity, while the private sector beyond traditional farming and herding remains limited.

Structural constraints on competition, plus small and micro business sectors that are not formally organized, suggest that any expansion of specialized consumer markets to interact with global supply chains will face significant hurdles across the region. But despite logistical and regulatory obstacles, plus a lack of detailed market research, North Africa does have some of the most resilient emerging economies in the world.

Youthful and forward-looking

The region now has a median age of approximately 25, and a population growth rate of more than 1.5%. Among the young, urban consumers, you find pet owners who are increasingly aware of modern pet care practice. Insights from industry players such as Pawsket in Egypt and Wiggly in Morocco show that this consumer transition is also marked by a shift into specialized pet ecosystems.

That is particularly visible on online platforms that provide door-to-door delivery to regions where access to large physical retailers remains limited.

And as these companies say, future success in the market will depend very much on adaptive retail, where digital platforms satisfy the growing demand for high-quality nutrition while simultaneously mitigating the risks of import dependency by promoting reliable, locally produced alternatives. ♦



Stephen Warner, CEO, Absolute Pets

“Customers enjoy the flexibility of quick delivery so there’s less need for subscriptions”

After being acquired by retail giant Woolworths, it’s an exciting time for the South African pet chain as it takes advantage of the group’s formidable network to boost brand visibility.



David Palacios Rubio

Editor-in-Chief

GlobalPETS

With more than 200 stores nationwide, Absolute Pets aims to solidify its position as a premium destination for pet parents. As Amazon and Walmart enter the market, the Cape Town based company is focusing on competitiveness and accelerating its online expansion, with e-commerce sales growing by over 30%.

CEO Stephen Warner outlines the company’s expansion strategy, discusses digital growth and explains how the retailer plans to stay ahead in the market by remaining at the forefront of pet trends.

Retail group Woolworths acquired a majority stake in 2024. How has this changed the way Absolute Pets operates?

Woolworths is a really good partner, because its customers are very similar to ours. Obviously, pet specialty and vet-recommended food are only sold through a pet specialty channel. So a lot of shoppers who go to buy their groceries at Woolworths then get their pet supplies from Absolute Pets.

This also helps in expanding your retail presence...

Woolworths as an organization has a long history, an exceptional reputation for quality and strong capabilities, so we’ve learnt from them. And because it’s a bigger retailer opening stores on a regular basis, that has obviously helped to accelerate our store rollout too.

Our property team is in regular discussions with landlords about opening new stores. Now, when Woolworths is entering a new location as part of a new development, they include Absolute Pets in conversations with property developers. This allows us to engage at a very early stage and secure prime locations.

There hasn't necessarily been much change to the way we operate, as the Absolute Pets model has been working well for the company. But it has of course opened doors to more opportunities and expertise, which will certainly impact the way we move forward.

Which store openings near Woolworths locations have worked well for you?

Woolworths opened a store at a new center in Paarl, just north of Cape Town, and Absolute Pets launched a store at the same location.

If Woolworths is already in the center, they may identify available or soon-to-be-available spaces during discussions with the landlord, which are then considered for Absolute Pets.

These locations of course work well for Absolute Pets, and have in the past, as our shopper demographic is very similar. A Woolworths shopper who is also a pet owner has the convenience of a specialty pet store at the same location. A new store in Pretoria is set to open in 2026, and several other openings are in the pipeline.

How has this affected customer traffic and brand awareness?

It is primarily about adjacency. The stores remain separate, with their own entrances and checkout points, so the customer journey has not changed significantly. Historically, Absolute Pets stores were often located just outside a Woolworths entrance or exit, so this proximity is not new. But one key opportunity lies in customer awareness.

Around 32% of shoppers who purchase at Woolworths were unaware of Absolute Pets. This represents a significant opportunity: simply increasing awareness can strengthen brand recognition and clearly position Absolute Pets as a destination for specialist pet food.

There are also promising marketing opportunities through Woolworths' channels. Absolute Pets has been presented to the Woolworths customer base in various ways, helping to extend reach and engage new customers.

Any plans to integrate Absolute Pets into Woolworths stores too?

Not at the moment. The big brands within the South African space need a dedicated pet specialty offering. A 'store-within-a-store' concept doesn't work in terms of their criteria for being pet specialty. We've engaged with them on that aspect, but it's not something we're pursuing for now. Obviously, we'll keep an eye on it, to see if guidelines or guardrails change.

Which customer demographics are driving premium pet purchases?

From a generational perspective, 18 to 34-year-olds are twice as likely to buy premium accessories. Younger generations are embracing pet humanization more strongly than older generations, even though our biggest spending group is aged 35-54, as they're the most economically active. Pet humanization behaviors are the strongest among 25 to 40-year-olds, and couples without children tend to spend more on pets than those with kids.

In 2023, you said that within the next three to five years you were aiming to add around 100 stores, covering approximately 85% of the market. Does this plan still hold?

We opened our 200th store last December, which was a major milestone. I think we have a really strong and experienced team and a great portfolio of stores.

The store location is so important in the South African context, which is a bit different to the European and US markets, where there are much bigger box formats and people make a dedicated trip to purchase their pet supplies.

"When insect protein emerged, we adopted it early. Other trends, like gently cooked, frozen or raw food, are also growing strongly within the South African market."

In South Africa, the bigger box retailers have not performed as well as they have in other geographies, and it's been more about convenience. So for us, there's a huge amount of value in being in a good center that is close to one of the supermarkets, particularly Woolworths because of the strong alignment.

In 2025, we opened in the Eastern Cape city of East London for the first time – one of the major metropolises we hadn't yet entered. In terms of coverage, we may not quite have reached 85%, but we're getting very close now.

What are the plans for store openings in 2026?

We are targeting 20-25 new stores in the coming year. But it is always about profitable growth, so it is not just about achieving the store numbers. We only want to open stores that will be viable.

How is your online strategy performing?

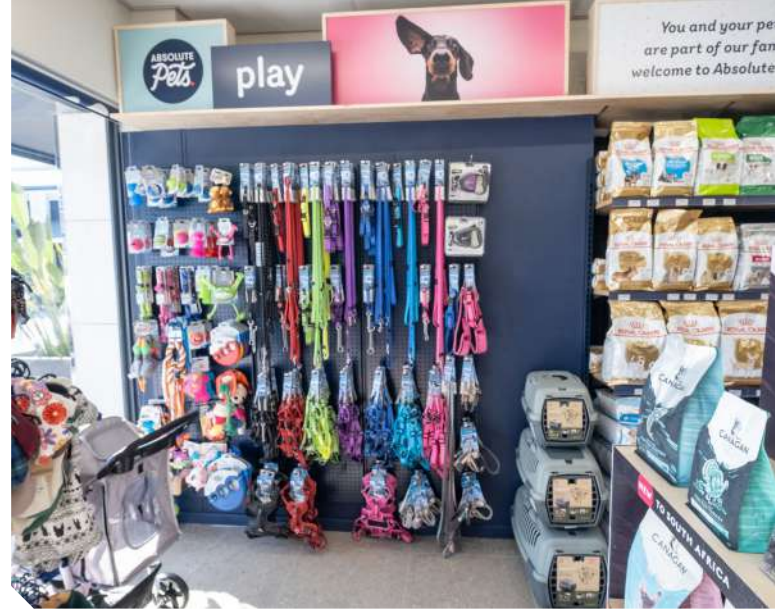
In the South African context, the latest data shows that e-commerce accounts for about 10% of pet specialty sales, which is still low compared to other markets. E-commerce remains the fastest-growing part of our business, with 33% growth in online sales. We also see that, depending on the delivery method, the basket size is roughly double that of in-store purchases.

We've invested heavily in our e-commerce capabilities and we see customers shopping across both channels. By far the largest cohort of our customers shop across both brick and mortar and e-commerce, while pure-play online shoppers make up less than 10%.

What about on-demand and quick delivery?

We provide an on-demand delivery service that delivers in as little as 60 minutes through our own app. With 200 stores, Absolute Pets is well positioned to reach a wide customer base and fulfill the promise we make to our customers. We also work with a third-party logistics provider for deliveries, fully integrated into their system, and have strategic partnerships with leading ordering and delivery platforms in South Africa.

The economics of e-commerce are critical and we're careful not to cannibalize profitable brick-and-mortar sales with unprofitable online sales. Pricing is kept



consistent across in-store and e-commerce, ensuring the business remains viable. This strategy has proven effective: we see that e-commerce basket sizes are significantly higher than in our physical stores.

Are subscriptions a key part of your growth plans?

In South Africa, subscriptions are well established, but penetration isn't the same as in markets like the US. One reason is that customers enjoy the flexibility of getting products within an hour, so there may be less need for a subscription service. That said, subscriptions do perform well, particularly for pet food, which is both recurring and bulky.

In other markets, the model has shifted from the traditional big distribution center approach, where deliveries took one to three days, to a hub-based system. Now, there's a strong expectation of same-day delivery – or even faster – with orders often coming straight from stores.

Amazon recently entered South Africa. Have you seen any impact from a competition point of view?

The overall impact on retail is yet to be fully felt. We've also seen Walmart enter the market recently, opening its first two stores, and Takealot, which is essentially the South African equivalent of Amazon, owned by [global consumer internet group] Naspers. Takealot has been a major competitor for years, so we're used to competing with it in some product categories. Not all though, as it doesn't carry the full range of products that we do.

What are you doing to maintain consumer loyalty?

Our loyalty program has been running for over 10 years already. The next stage in our app

► [SEE NEXT PAGE](#)

involves customized incentives and gamification to reward desired behaviors: shopping with us regularly, increasing basket size, and purchasing tick and flea treatments, plus treats as well as food. It's an exciting project. We're currently running it in beta, and a full launch is planned for the first quarter of 2026.

How are you using AI to gather useful data about consumer behavior?

If you're talking about generative AI, that has started helping our business recently, though not so much within our customer loyalty programs. But we've been using machine learning for a while – to process large volumes of data and predict trends. From Absolute Pets' perspective, the challenge is making this data more accessible.

One of our aims for 2026 is to develop a more user-friendly dashboard that can be used by more people across the organization. It's an exciting space, and we're exploring how AI can impact various parts of the business. We've traditionally been a lean organization, but we've used AI tools extensively in marketing, planning and buying – and will continue to do so. It's definitely an area with a lot of potential.

With supermarket chains like Shoprite and Food Lover's Market recently entering the pet segment, how are you differentiating with a premium offering?

We aim to be at the forefront of new products. Our team constantly identifies trends and brings in new items, often for a short trial period. If they prove successful, we continue to stock them. This applies particularly to accessories, but also to cutting-edge nutrition.

For example, when insect protein emerged, we adopted it early. Other trends, like gently cooked, frozen or raw food, are also growing strongly within the South African market. Private label products remain a significant differentiator as well.

Grocery stores often lack a service focus, whereas we emphasize it heavily. We aim to create a pleasant in-store experience with knowledgeable staff who we call Pet Care Advisors. This includes a high staff-to-customer ratio, to ensure employees are available to assist shoppers.

"5% of Absolute Pets is now owned by employees through an employee share trust, giving them a real vested interest in the company's success."

Training is another priority: our Absolute Pets Training Academy delivers foundation-level courses annually for all staff. Over the past two years, we've introduced nearly 100 new training modules. This ensures our team is not only friendly and helpful, but also knowledgeable about pet products and able to provide the right recommendations. We're very happy with the results.

Customer service is a key performance indicator in our store scorecards, and we have had a very strong year. Our people are really passionate about pets and committed to both their wellbeing and the company's success.


To further strengthen this commitment, 5% of Absolute Pets is now owned by employees through an employee share trust, giving them a real vested interest in the company's success. This has fostered a positive culture and deep engagement, which is reflected in the results we see every day.

What is your strategy when it comes to services?

Our strategy does include offering services, particularly pet spas and grooming, but the market for these is smaller. Although services are part of our approach, viability is key, as they require a larger radius of customers to sustain them. If we have five retail stores featuring services within a 20km radius, we would be happy with that coverage.

We have opened two pet spas in the past year, which works out as approximately one for every 10 retail stores. Our first high-end spa in KwaZulu-Natal is designed to feel like a boutique hairdresser or barber, offering a premium experience.

Regarding veterinary services, South African legislation requires that vet practices be owned by a veterinarian, so our involvement would be through partnership models. We don't currently have any of these, but it is an area we continue to monitor closely. ♦



Patent activity reveals healthy state of pet tech

Over the past decade, pet care has undergone a remarkable transformation, with a surge in innovative products for everyday use driven by a booming sector and digital advances.



Angel Aledo Lopez
*Chief Operating Officer
European Patent Office*

Data from the European Patent Office (EPO) covering 2015-2024 shows a sharp rise in activity. In those 10 years, publications in the sector nearly tripled. A new generation of advanced healthcare and welfare pet devices is emerging.

The nations making the running

Following global innovation trends in nutrition, health and technology, China and the US have emerged as clear leaders in patent filings. Close behind are the Asian competitors Japan and South Korea, plus major European markets such as Germany and the Netherlands.

The 2022 White Paper on China's Pet Food Industry, published by Deloitte, forecasted the pet food market reaching ¥114 billion (\$16.3B/€14B) by 2026. If current trends continue, China is poised to take the lead in patent innovation for pet products – if it has not already done so in several specialized subfields.

Regional trends to watch

South Korea has been distinguishing itself with its inventive product design, alternative proteins and

innovative pet tech applications. The market is continuing to push boundaries, combining technology and nutrition in ways that cater to the country's increasingly sophisticated pet owners.

Europe, shaped by sustainability and circular economy goals, remains focused on greener formulations, packaging and materials. Brands across the continent are therefore prioritizing environmental responsibility, from how they source ingredients to reducing waste in the production and distribution of their products.

Southeast Asian countries such as Vietnam and Thailand, although not yet major patent applicants, are expected to become increasingly active in the coming years. As global supply chains evolve, more manufacturing and R&D operations are being outsourced to these regions, positioning them as emerging hubs for innovation in the pet industry.

Digital tipping point

In the mid-2010s, the majority of pet care patents centered on mechanical solutions. Typical inventions included feeders with basic timing mechanisms, ergonomically improved cages or kennels, and exercise devices of modest technological sophistication. These innovations laid the groundwork for today's industry.

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The real acceleration in creativity has come in the past decade, with a growing number of patent applications that have introduced digital components such as sensors, embedded software and wireless connectivity into everyday products including feeding stations, collars and litter boxes.

This convergence of hardware and data marked a turning point, transforming the field of pet care from a largely mechanical craft into a connected, technology-driven ecosystem.

Sensors and stationary devices

The hallmark of this new wave of innovation is the use of multiple types of sensors. A lot of patent applications are now directed to wearable devices such as smart collars that integrate accelerometers, GPS modules, weight sensors and even miniature cameras.

At the same time, many patents are being filed for stationary devices – including feeding stations, litter boxes and exercise appliances – that come equipped with scales, motion detectors and even image recognition systems. The goal for all these innovative products is no longer just to provide a service, but to gather continuous streams of data on the pet's activity, feeding habits, hygiene and overall health.

Automation as part of daily life

Automated feeding systems show how far we've come. The patent applications filed at the EPO are

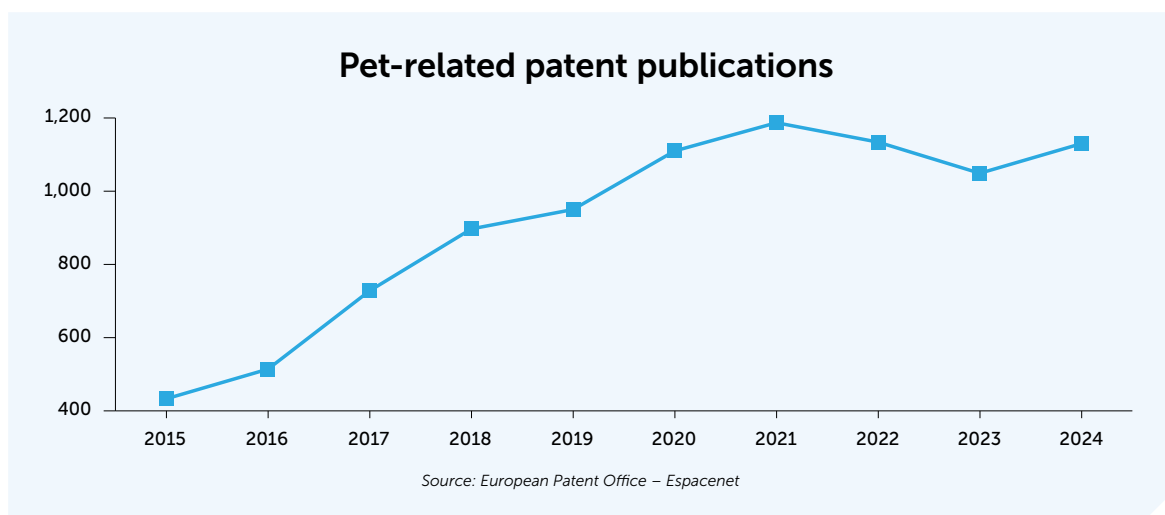
The convergence of technology, welfare and consumer demand is transforming more than just the way we care for pets – it is redefining the very business of patents.

no longer limited to food being dispensed at fixed intervals, adjusted mechanically. Patents now protect devices that can adjust feeding to meet the individual pet's needs. By linking weight measurements, activity patterns and even biometric indicators, they can tailor feeding plans in real time, ensuring healthier outcomes and preventing overfeeding.

Hygiene is also an area of significant activity in patenting. In recent years, patent filings have begun describing litter boxes equipped with monitoring capabilities, to track usage frequency or detect differences in waste characteristics.

These features do more than offer the convenience of knowing when to change the litter – they provide early diagnostic potential for owners and vets, flagging any unexpected activity right away.

For both training and behavioral management, there are more and more patent applications for interactive devices that provide instructions or stimuli to pets, often coordinated through mobile apps. This enables a more consistent, data-driven approach to training, benefiting both pets and their owners.



What was once focused on straightforward mechanical technologies now demands expertise across multiple domains, from materials to software and connectivity.

Cross-disciplinary applications

These examples illustrate the increasing sophistication of pet-related inventions. At the EPO and other patent offices, steady growth has been observed in classifications related to animal husbandry (A01K) and veterinary technology (A61D), mirroring broader trends in digitalization and health-related innovation.

The result is a growing complexity in filings involving connectivity, data governance and ownership, and even ethical considerations in the use of AI for pet health.

As cross-disciplinary applications become the norm – blending biotechnology, AI and data analytics with traditional pet care technologies – this brings new challenges and opportunities for the patent profession. So today's examiners are multidisciplinary professionals who combine deep knowledge of these emerging technologies with a solid understanding of traditional pet care systems.

Assessing patentability

Examiners and practitioners must navigate issues once confined to other technical areas, such as the legal treatment of computer-implemented inventions or methods involving medical procedures on pets. And what was once focused on straightforward mechanical technologies now demands expertise across multiple domains, from materials to software and connectivity.

Regulations and examination guidelines dealing with 'technical character' and 'technical contribution' have therefore gained new relevance. In this emerging landscape, the question of what constitutes a 'technical' invention has become a central challenge in securing and defending patents in the pet technology domain.

As both established consumer goods companies and dynamic startups invest heavily in pet tech, patent portfolios are becoming strategic assets – not only for legal protection but also for market positioning and for attracting investors in a rapidly consolidating sector.

Patent activity is a reliable barometer of innovation, and the EPO's data clearly shows that the world of pet technology is entering a distinctly digital era.

Wellbeing in a connected world

Beyond convenience, these inventions all aim to enhance pets' wellbeing, encompassing advances such as AI-based health monitoring, connected feeding systems, biodegradable materials and precision nutrition. The trajectory points toward a future in which caring for pets is not only easier and more efficient, but also more deeply informed by science and technology.

In essence, the convergence of technology, welfare and consumer demand is transforming more than just the way we care for pets – it is redefining the very business of patents. So patent offices and professionals are now required to adapt to a market where digital innovation and data-driven design extend far beyond traditional boundaries, ultimately helping to create a healthier, more connected world for pets and their parents. ♦

Innovations in allergy management

Cat allergies are the most common animal-origin allergy and affect about 10-20% of adults globally, according to the medical charity Allergy UK. Various patents are emerging to tackle cat allergies. One of these innovations adds antibodies to pet food to neutralize allergens in a cat's mouth or environment.

Other patents focus on using virus-like particles (VLPs) to trigger immune responses in humans, potentially reducing allergic reactions. Essentially, these VLPs can act like vaccines, eliciting an immune response that helps prevent the body from experiencing allergic reactions.

When it comes to a pet's own problems with allergies, there are several patents which address food allergies caused by specific proteins. These diets often use alternative proteins like duck, venison or fish and include fiber to support digestion and immunity.



VAFO Group

Beyond the label: the data-driven future of pet gut health

The next step in gut health isn't just about better ingredients – it's about unlocking the insights to be found within the microbiome.

Mirroring human health, demand is shifting in pet care towards prevention, personalization and data-driven approaches. A new generation of solutions shows that nutrition is no longer just about the label, but about what is actually happening inside the body.

From ingredients to insight

For a long time, digestive care focused primarily on feed composition. Prebiotic fiber and probiotic cultures became standard features on product labels and in brand communication. In recent years, however, this approach has begun to change.

While many products still differ only cosmetically, dog owners are increasingly asking a more fundamental question: what actually works?

Data-driven strategy

VAFO Group is addressing this need by integrating a new analytical dimension. The recent acquisition of BIOME9

introduces a microbiome-led perspective across the group's nutritional strategy.

This data-driven approach is shaping services and solutions that respond to the individual needs of each animal. The first result of this approach is the Pooch & Mutt Gut Health Test, which allows pet owners to base decisions around nutrition and supplementation on concrete data rather than general recommendations.

The strategy is supported by expanded research infrastructure, including a new laboratory in Wales and a partner laboratory in Berlin, strengthening the scientific foundation behind these microbiome-led solutions.

The biological reality

One of the key limitations of traditional approaches to digestive health is the assumption that applying a universal solution to biologically diverse animals will be effective. Dogs differ not only

by breed, but also by age, size, weight, environment and daily routine. These differences have a significant impact on their gut microbiome. It is a complex and dynamic system of trillions of bacteria that influences not only digestion, but also metabolism, immunity and behavior.

"The microbiome is not just about digestion, as people often assume. It is involved in almost every major system in a dog's body," explains Dr. Bushra Schuitemaker, Head of Microbiology at Pooch & Mutt.

Shifting from reaction to prevention

Another major shift is the time factor. Digestive care has traditionally been addressed only once visible issues appear, such as irregular stools, bloating, skin problems or behavioral changes. At that stage, however, the gut microbiome has often already been disrupted, frequently for longer than owners realize.

As Dr. Schuitemaker points out, changes in the gut microbiome often occur well before any visible symptoms emerge. At-home testing allows owners and professionals alike to identify imbalances at an early stage, prioritizing long-term maintenance over the reactive treatment of acute issues.

At-home gut health tool

This is where at-home tools such as the Pooch & Mutt Gut Health Test come into play.

The test analyzes a stool sample to map a dog's gut microbiome, revealing the diversity and balance of beneficial bacteria. These insights are then translated into clear, personalized guidance on diet, supplements and lifestyle, supporting better long-term wellbeing.

Data driving decisions

In a crowded market where health claims are commonplace, ingredient lists alone are no longer the main decision-making factor. The presence of fiber or prebiotics does not indicate whether a solution truly meets the needs of a specific animal.

Microbiome data actually provides insight into the real state of digestion and enables genuinely tailored care.

"Through microbiome testing, we can precisely identify what an individual dog may be lacking, such as low levels of beneficial bacteria that support digestion and help reduce inflammation," explains Dr. Schuitemaker. "Based on these findings, targeted changes to diet and supplementation can then be recommended."

This principle underpins the importance of at-home kits that combine laboratory analysis with practical recommendations for everyday care.

What it means for brands

Working with gut microbiome data offers manufacturers distinct advantages:

- **Credibility:** It substantiates product efficacy in a market where consumers are increasingly skeptical of generic claims.
- **Retention:** It fosters long-term relationships by monitoring progress and evolving recommendations over time.
- **Innovation:** Microbiome data helps uncover unmet needs across different life stages, ensuring products are solutions to biological realities rather than just responses to trends.

Proven outcomes

Microbiome research is reshaping how gut health is communicated. While broad benefit claims once dominated, the emphasis is now shifting towards results and clear, understandable explanations.

Transparency no longer lies solely in clearly listed ingredients, but in the confidence that a brand truly understands animal needs and can explain why its solutions work and what value they deliver.

Microbiome testing does not replace functional ingredients. Instead, it gives these ingredients concrete relevance and enables more targeted use.

Solutions such as the Pooch & Mutt Gut Health Test bring scientific insights into everyday pet care and help owners make more informed decisions that support their pets' long-term health.

Future standards

As the gut health niche continues to evolve, targeted care and prevention are expected to play an increasingly important role. Advances in microbiome research and data analysis are enabling a shift from one-off solutions towards care that naturally adapts over time to each animal, its life stage and changing needs.

Regular monitoring and continuous adjustment of recommendations are becoming the new standard of premium pet care that evolves alongside the animal. The future of gut health innovation therefore lies not only in scientific progress itself, but in its ability to translate into practical and easy-to-understand decisions in everyday care.

At-home microbiome testing tools help brands and pet owners move beyond generic promises toward approaches that deliver lasting value for animal health and for the trust of pet owners. ♦

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Food for thought: nutrition that boosts brain power

Aging trends in the pet population are bringing cognitive health into sharp focus. Could functional ingredients such as mushrooms help combat mental deterioration?



Laura Ward
Pet Nutritionist
Rewarding Pet Nutrition

As pets live longer, cognitive decline is becoming an increasingly important concern for owners and veterinarians alike. New scientific evidence highlights how targeted nutrition, including the use of medium-chain triglycerides and mushroom-derived compounds, can help maintain mental sharpness and improve wellbeing in aging pets.

Cognitive dysfunction in pets

An estimated 28% of dogs are affected by cognitive dysfunction syndrome (CDS) by the age of 11 years, with over 66% affected by 15 years. CDS has been likened to Alzheimer's disease in humans, with affected dogs commonly showing similar symptoms of disturbed sleep cycles and social interactions, disorientation and a reduction in learned behaviors.

Cognitive decline also affects cats, who show signs of confusion, disrupted sleep patterns, reduced social interaction and vocalization. These behaviors in elderly cats have been connected to tau protein accumulation, suggesting that cats are also affected by Alzheimer's disease type conditions.

Nutrition for brain health

Many nutrients are essential for brain health, focus and cognition. Amino acids, fatty acids (including omega-3s), vitamins, minerals and antioxidants all play key roles in the maintenance of the brain's everyday health.

Deficiencies in, and imbalances of, nutrients can affect mood, behavior and cognitive health. The importance of feeding a complete and balanced diet to ensure that no deficiency or oversupply of nutrients is present cannot be overstated.

Functional ingredients can additionally support cognitive health and focus.

Role of medium-chain triglycerides

Dietary medium-chain triglycerides (MCT) act in the brain on two levels. Firstly, sufficient dietary MCT increases fatty acid oxidation, raising the quantities of omega-3 polyunsaturated fatty acids (PUFAs) within the brain. Omega-3 PUFAs have a structural role within neuronal membranes, as well as being involved in neurogenesis and cell signalling.

Concentrations of PUFAs within the brain reduce with age and are lower still in those affected by Alzheimer's. In rodent studies, impaired learning and memory is seen where omega-3 PUFA concentrations are reduced, and in affected humans, impaired cognitive performance is observed.

Secondly, MCT act within the brain as an energy source. Brain glucose metabolism has been shown to be significantly reduced in dogs at six years old compared to those aged one year. This age-related decline is consistent with that seen in humans, monkeys and rats. Elderly human patients with Alzheimer's are reported to have significantly lower cerebral glucose metabolism than healthy older people.

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MCTs as supplements

Glucose is utilized inefficiently as the brain ages – although this is not specific to Alzheimer’s disease or CDS. Dietary MCT is therefore a potential tool to support the continued provision of energy for the brain and polyunsaturated fatty acid concentrations. As the pet population ages, MCT supplementation could support cognitive health and wellbeing.

A study from researchers at the University of Toronto, published in *Neurochemical Research* in 2009, found that dietary enrichment with MCT raised omega-3 PUFA levels in the brains of older dogs, suggesting that dietary MCT could work as a potential strategy for the restoration of structural and functional aspects of age-related decline.

The effect of dietary MCT in dogs was investigated in a study published in *Frontiers in Nutrition* in 2018, by researchers at Nestlé Purina Research in the US and CanCog Technologies, Canada. The study found that 6.5% MCT in the diet of dogs gave significant improvement in cognitive dysfunction symptoms by day 90, when compared with the control. Improvements seen included reduced disorientation, altered social interaction and reduced loss of house training, with most benefits seen by day 30.

Hepatic oxidation of MCT oils produces ketone bodies. Ketone bodies are an alternative source of energy for the brain, usually utilized under starvation conditions. In supplementation conditions, these ketone levels are lower than that induced during chronic starvation (0.5 mmol/l), and no adverse health effects in dogs have been recorded. In the 2018 study, no toxic effects were seen at any dose, up to 15% MCT inclusion, over 90 days.

Mushroom varieties such as reishi, lion’s mane and cordyceps have been traditionally used within alternative and Chinese medicine for a wide variety of

reported health benefits, including antidepressive and neuroprotective qualities.

In observational studies, higher mushroom consumption is connected to better cognitive performance and reduced likelihood of the development of mild cognitive impairment.

Clinical double-blind studies of medicinal mushroom varieties have been carried out in humans, across age ranges from students to the elderly. Reported results include increased sense of wellbeing, improvements to cognitive impairment, alleviation of anxiety and depression, and improvements to sleep quality and stress levels.

Range of reported benefits

Mushrooms contain bioactive compounds, on which their functional benefits are based. For instance, ergothioneine, a sulfur-containing amino acid, has been studied to understand its potential applications in neurodegeneration. Preliminary trials in adults showing mild cognitive impairment resulted in markers of neuronal damage stabilizing, and modest improvements seen.

Similarly, lion’s mane mushroom contains erinacines and hericenones, which easily pass through the blood brain barrier. These compounds stimulate synthesis of nerve growth factors and have shown benefits for neurodegeneration and cognitive maintenance.

Erinacin A has a protective effect against Parkinson’s disease in a mouse model, while Erinacin C shows neuroprotective properties and supports reduced inflammation of neurons. Turkey tail mushroom contains a polysaccharide peptide which shows anti-aging properties, promoting memory and learning.

Reishi’s action is different again, although similarly many active compounds are present, with a study showing the inhibition of oxidative stress-induced aging and the neutralization of oxidation damage.

As the pet population ages, MCT supplementation could support cognitive health and wellbeing.

Mushroom supplementation in the canine diet was found to be safe, palatable and well tolerated – important for pet owner compliance.

Furthermore, mushrooms are rich in polysaccharides, such as B-glucans, which are responsible for immunomodulatory benefits, but also terpenes and proteins, reportedly providing anti-inflammatory, antioxidant and anti-tumor properties.

Although more studies are required to understand more about how different mushroom varieties affect health and wellbeing, it seems clear that they have great potential to benefit mental and cognitive health.

Next-generation nutraceuticals

Mushroom varieties have been present on the register of animal feed materials for some time, however studies to substantiate their use within functional nutrition, particularly in pets, has been lacking.

A study that is currently in the preprint stage, from researchers at the Veterinary Health Research Centers, utilized mushroom pet supplement manufacturer MycoDog's Clarity product to support claims that mushroom-derived nutraceuticals may stabilize or improve cognitive decline in aging dogs. Trial data of 30 dogs showed 59% improvement and 23% stabilization of cognitive decline.

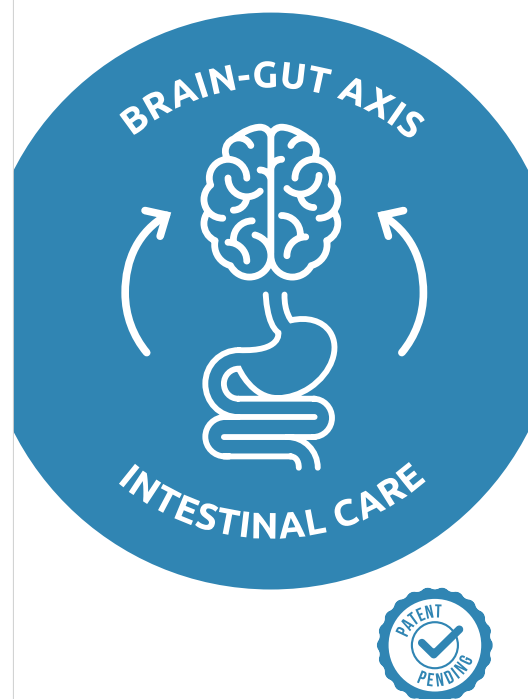
Smart collar data confirms that supplementation resulted in improved sleep with fewer interruptions. Behaviors such as disorientation and interactions showed a greater improvement with supplementation, than did behaviors such as anxiety and the regression of house training.

This study suggests that mushroom supplementation is most effective for early CDS, showing less effect as the condition advances.

Mushroom supplementation in the canine diet was found to be safe, palatable and well tolerated – important considerations for pet owner compliance when feeding functional ingredients, to encourage long-term inclusion in the pet diet.

Growing area of interest

Medium-chain triglycerides and mushrooms are just two methods which may benefit cognitive and mental health through functional nutrition. More research into their efficacy and safety is needed, and studies to support other similar ingredients and nutrients are set to be welcomed. ♦



Blend specially designed to promote the gastrointestinal health of our animals.

With high-quality ingredients, it helps maintain digestive balance and promotes intestinal well-being by supporting the microbiota.



Vegan pets: what does the data say?

As plant-based foods become more nutritionally sophisticated, recent research suggests they can be digestible and potentially beneficial, at least for dogs.



Emma Penrod
Contributor
PETS International

Commercially available vegan kibbles appear just as likely to meet canine nutritional needs as meat-based kibbles – that’s the conclusion of a study by the UK’s University of Nottingham published last year.

Recent nutritional analyses

The study, published in the journal *PLOS One*, found the nutritional composition of six plant-based dog kibbles was comparable to that of 25 meat-based foods. The plant-based foods were, however, found to be lower in iodine and B vitamins.

Half of all foods tested – both meat- and plant-based – were deficient in one or more amino acid. Less than a quarter of the tested kibbles contained adequate B vitamins, and just 16% met all mineral recommendations, according to the study.

Lead author Rebecca Brociek notes that the results showed a fairly even playing field between meat-based and plant-based kibbles. “I thought given what people

say about plant-based diets, that the meat-based ones would be kind of perfect and hit all the nutrient minimums, and that all the plant-based ones would be deficient in something,” she says.

Previously, an analysis by Brazilian researchers, published in *PLOS One* in January 2020, reported deficiencies in calcium, potassium, sodium, methionine and arginine in four vegan pet foods – three for dogs and one for cats. Brociek notes that the Brazilian study lacked a meat-based comparison group, making deviations appear unique to vegan foods when they are common across all formulations. For example, the UK study identified three meat-based pet foods that did not contain adequate zinc.

Researchers have yet to definitively conclude why vegan pet foods consistently had lower levels of iodine and B vitamins. Although these nutrients are

There is a small but growing body of evidence suggesting meat-free diets are digestible for dogs and could come with some health and environmental benefits.

It is estimated, based on the results of the pet survey owners in Canada, that 1.6% of dogs owned globally are fed vegan diets, primarily by owners who are themselves vegan.

generally more difficult to obtain without meat or dairy, most kibbles contain vitamin and mineral pre-mixes that should compensate for natural shortages in base ingredients. The plant-based kibbles may be more sensitive to high-heat processing or storage conditions, according to David Gardner, Professor of Physiology at the University of Nottingham Veterinary School.

Sample representation

The sample selection of diets could explain some of the differences in nutritional analysis, with Brociek pointing out that the foods for the Brazilian study were all sourced from a market local to the researchers. The British team, similarly, sourced its samples from pet supermarkets in the Nottingham area and ended up with a selection of six plant-based dog foods.

Local sampling was intentional, as the research team wanted its study to reflect the quality of foods available to the average consumer. However, this also means that both studies represent a snapshot of what vegan manufacturers offer and might fail to capture variations in nutrient content that may occur between batches of a single brand of pet food, or even within a batch itself.

The researchers from the University of Nottingham excluded vegan cat food because they were unable to find enough vegan cat food on the market to assemble what they considered a meaningful sample.

Health implications

While the 2025 University of Nottingham study didn't investigate nutrient absorption, other digestibility studies show favorable results. A review of the impact of vegan diets on health indicators, published in 2023 in the journal *Veterinary Sciences*, found no significant evidence that plant-based diets harm pet health, with a handful of studies suggesting potential benefits for dogs.

One survey of 1,400 pet owners in Canada and the US identified potential associations between plant-based

diets and increased health and longevity in dogs.

The results were published in the journal *Research in Veterinary Science* in 2022, although the research team at the Ontario Veterinary College warned of the effect of inherent bias.

A related survey of 1,300 cat owners published in *BMC Veterinary Research* in 2021 by the Ontario Veterinary College research team reported that vegan cats do not seem to enjoy the same benefits, though the cats showed no ill health – with the same caveat noted as to owner bias.

A handful of the six studies of vegan cat health included in the 2023 review did report signs of nutrient deficiencies and some associated inflammation and muscle damage, though the results were inconsistent between them. The inconclusive nature of these findings means the picture for cats seems to be more complex than that for dogs.


The review also found that many studies of plant-based dog and cat diets only followed the animals in question for a matter of weeks or months, which may not have allowed enough time for clinical signs of deficiency.

Guidance going forward

It is estimated, based on the results of the pet survey owners in Canada, that 1.6% of dogs and 0.7% of cats owned globally are fed vegan diets, primarily by owners who are themselves vegan.

Most research into these diets has been conducted since 2020, according to Dr. Andrew Knight, a veterinarian and adjunct Professor of Veterinary Medicine at Australia's Murdoch University. The 2025 study from the University of Nottingham caps off a small but growing body of evidence suggesting meat-free diets are digestible for dogs and could come with some health and environmental benefits.

To align with the growing evidence, the British Veterinary Association (BVA) updated its recommendations in 2024, stating that a nutritionally complete vegan diet can be safe for dogs, while continuing to discourage meat-free diets for cats. FEDIAF, the body representing the European pet food industry, has adopted a similar position. ♦



Enifer FINLAND

Old science, new purpose: mycoprotein's return to the pet food bowl

Pet parents demand more from what goes into the bowl, with rising sustainability expectations. The question is no longer if alternative proteins will shape the future, but which ones.

One answer to the demand for alternative protein has been quietly brewing for decades: mycoprotein, the root network of fungi.

Neither plant nor animal, mycoprotein combines the best of both worlds: an amino acid profile comparable to meat, with a fraction of the environmental impact. Enifer's PEKILO®Pet is the original mycoprotein making a comeback.

The unexpected origins of mycoprotein

The origins of PEKILOPet are as fascinating as its future. The story begins in Finland in the 1960s, where visionary engineers discovered that fungal fermentation could be employed to upcycle industrial side streams into high-quality protein – the world's first mycoprotein.

Much like brewing, this proved both efficient and remarkably scalable. Decades ahead of its time, PEKILOPet was successfully used as a feed ingredient between 1975 and 1991, building a strong track record for safety, performance

and nutritional benefits long before 'alternative protein' became a buzzword.

Today, this innovation is being revived by Enifer. The company's mission is clear: to bring improved PEKILOPet to the global pet food market by combining decades of proven science with modern technology and new side streams.

Nutrition for all life stages

PEKILOPet offers solid nutritional and functional characteristics for pet food formulations. The granulated powder in its supplied form contains approximately 60% crude protein and 24% fiber, of which 13% is fungal beta-glucan, providing a protein- and fiber-rich ingredient suitable for a wide range of pet food applications.

PEKILOPet is low in fat and naturally contains nucleotides, supporting formulations across different life stages, including growth and weight management. It supports healthy digestion, a balanced gut microbiota, and has been shown to support a strong immune system.

The ingredient contains compounds such as spermidine and features a favorable amino acid profile, including leucine. With its high digestibility, PEKILOPet is suitable for pet food products designed for puppies, kittens, and adult and senior animals.

A carbon footprint under 1kg CO₂e/kg allows PEKILOPet to deliver nutritional value with minimal environmental impact.

Product innovation

Beyond nutrition, PEKILOPet offers strong functional benefits. Its high water-holding capacity opens new opportunities for texture, juiciness and formulation. For pet food brands, PEKILOPet is not only a sustainable protein, it's a fresh take on product development.

PEKILOPet is not a trendy novelty. It's a rediscovered original – ready to help shape a more nutritious, sustainable, and resilient future for pet food. ♦

Enifer
enifer.com

Riding the next wave of omega-3 in pet food

Players operating in this lucrative field are investing in innovation, as supply volatility and sustainability issues present challenges.



Diana Dominguez
Business Reporter
GlobalPETS

Although the global omega-3 pet supplement segment is set to almost double by 2035, market pressures are prompting businesses to seek novel ways to source these valuable nutrients. A closer look at the current state of the sector reveals how manufacturers are investing in the development of smart solutions.

Accepted range of benefits

Omega-3 fatty acids are scientifically proven to provide health benefits to cats and dogs, particularly in supporting vital functions such as skin and coat health, heart and kidney function, joint mobility and vision. These healthy fats are also essential for brain and neural development in puppies and kittens, and support cognitive health in senior pets.

The pet food industry uses three main types of omega-3: alpha-linolenic acid (ALA), which is primarily derived from plant materials, plus eicosapentaenoic acid (EPA) and docosahexaenoic acid (DHA), which are mainly sourced from algae or marine fish. In pet nutrition, the fatty acids can be incorporated into all formats of food – from dry kibble and wet food to treats and supplements.

According to George Josef, Global Director of Business Development in Nutritional Lipids and Alternative Proteins for Pet Food at dsm-firmenich, EPA and DHA

are the most biologically active omega-3s and can be directly used by pets' bodies to support essential functions.

"By targeting inflammation, these omega-3s can also help address skin allergies, joint problems and age-related conditions – all top health concerns among pet parents," Josef tells PETS International, adding that algae-derived omega-3 delivers the highest concentration of EPA and DHA, and is also more sustainable.

Health-conscious owners drive growth

Recent estimates from Future Market Insights (FMI) show that the global omega-3 pet supplement market was set to reach approximately \$1.57 billion (€1.43B) in 2025. It is predicted to continue expanding at a compound annual growth rate of 7.9%, nearly doubling to \$2.93 billion (€2.66B) by 2035. This market growth is being driven by pet owners' health consciousness and awareness, as well as research advances in the omega-3 segment.

According to Christine Wu, Technical Sales Manager for Asia-Pacific (APAC) – Animal Nutrition at Corbion, which develops sustainable food ingredients, cats and dogs are the biggest market for omega-3s among companion animals because they are obligate carnivores. Cats have no ability – and dogs have only limited ability, compared with herbivores – to convert ALA into EPA and then into DHA.

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Positive effects in dogs and cats

A study titled 'Exploring the efficacy and optimal dosages of omega-3 supplementation for companion animals' published in the National Center for Biotechnology Information (NCBI) database in the US, found that varying doses of EPA and DHA are needed to show positive effects, depending on the health issues of cats and dogs.

For instance, low to moderate dosages were found to help ease skin problems, while moderate to high dosages were effective for joint issues. For cognitive health, high dosages presented better results.

Josef of dsm-firmenich comments that cats and small dogs (those weighing under 9kg) tend to be overrepresented as a demographic for omega-3 supplementation, as they are generally easier to care for and therefore tend to live longer on average than larger animals.

"There is a growing cohort of consumers looking for pet food with age-specific benefits, such as joint support – a health area omega-3s are well known to address," he says.

Evidence-based outcomes

QRILL Pet, a Norwegian-based biotech brand and krill-based ingredient producer owned by the Aker QRILL Company, has observed three key factors increasing omega-3 consumption among pet owners: health longevity, evidence-based health benefits and scientifically backed, responsible ingredient sourcing.

"Pet owners are not just buying omega-3 in itself. Rather, they are paying for evidence-based outcomes and the reassurance that the food they feed their pets is aligned with their own expectations and values around health and environment," says Tonje Dominguez, Director of Specialty Animal Nutrition Products at Aker QRILL Company.

In addition, an increasing number of owners aim to provide their pets the same levels of nutrition that they seek for themselves. Josef notes that a clear majority is actively looking for immune-supporting nutrients in pet food, and large numbers insist that vitamin and mineral inclusions come backed by scientific proof.

Barriers to adoption

Although omega-3s are already an established, scalable market, a number of factors are holding back faster industry adoption. Costs remain the leading barrier.

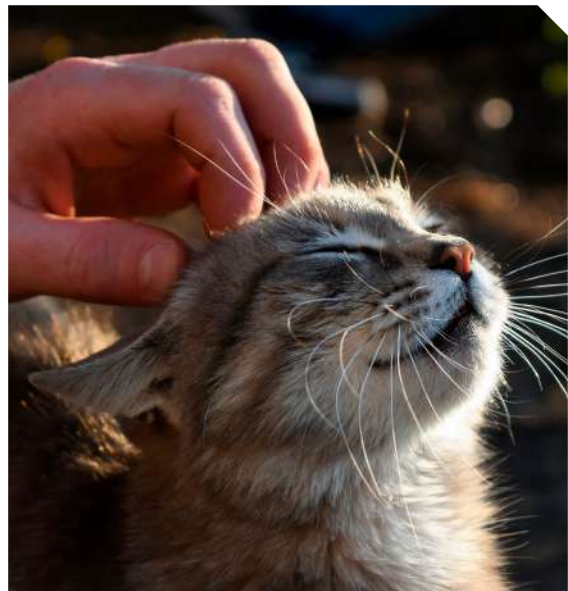
"Price volatility in traditional marine oils can make it difficult for pet food producers to maintain consistent EPA and DHA levels, and oxidative stability continues to be a technical challenge since omega-3s are prone to oxidation," says Dominguez. In other words, they degrade easily, impacting on freshness.

Another major barrier to omega-3 adoption is sustainable sourcing. Fish oils are commonly extracted from fatty fish such as salmon, mackerel and sardines, with production averaging about 1.1 million tons per year over the past 10 years. However, according to the Food and Agriculture Organization of the United Nations (FAO), almost 90% of the world's marine fish stocks are now fully exploited, overexploited or depleted.

Sustainable sourcing is smart

These pressures in terms of costs, sustainability and supply volatility are prompting manufacturers to innovate and seek market alternatives.

Katarzyna Świrkowicz, Business Development and Sales Manager – Pet Food and Animal Nutrition at Corbion, states that the smart solution would be algae-derived omega-3s produced at scale by fermentation on land in fully controlled environments. "By growing microalgae with industrial-scale precision-fermentation technology, we can access nature's original source of omega-3 while reducing pressure on marine resources," she says.



Low to moderate dosages of EPA and DHA have been found to help ease skin problems, while moderate to high dosages were effective for joint issues.

According to Świrkowicz, algae ingredients in both solid (dry biomass) and liquid forms (suspensions and oils) are accepted by the Association of American Feed Control Officials (AAFCO) and the European Pet Food Industry Federation (FEDIAF), besides having Food and Drug Administration (FDA) registration in the US and being in the EU Catalogue of Feed Materials.

In the next few years, sustainably sourced algae ingredients are therefore expected to move from an emerging option to one of the most widely chosen sources of omega-3s.

Innovation opportunities

As an additional trend, Dominguez sees the development of multifunctional blends that combine omega-3s with other nutrients such as antioxidants, choline or probiotics.

"We also predict continued improvements in stabilization and processing technologies to make it easier to include high-quality omega-3s in the blends without compromising the products' shelf life," states Corbion's Wu.

There have been various recent examples of ongoing innovation in terms of adopting alternatives in the global omega-3 market.

In July 2025, Corbion secured multiple regulatory approvals from China's General Administration of Customs (GACC) to bring its algae-derived nutrition solutions to market in the country across both human and animal applications.

In September, Singapore-based biotech startup Umami Bioworks successfully registered two cultivated seafood ingredients for pet food in the EU, with a planned launch in Germany in early 2026.

The newly registered ingredients derived from white fish are sources of omega-3 fatty acids, protein and nutrients for pet food.

"With the growing pet population globally, the demand will continue to drive towards better understanding of optimizing pet health and nutrition," Świrkowicz concludes.

Provided that manufacturers continue to conduct research and innovate to overcome the current hurdles, the omega-3 market will continue to grow. ♦

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Why collagen is re-emerging as a strategic pet food ingredient

As pet food formulations shift towards fewer starches and cleaner labels, collagen is emerging as a versatile functional solution.



Esther Prevo, PhD

R&D Manager

Darling Ingredients International
darlingii.com

For decades, starch served as the industry's primary binder, essential for the structural integrity of extruded products. However, as manufacturers reduce carbohydrate loads to meet demand for high-protein and grain-free diets, maintaining product durability has become a complex formulation challenge. This is where collagen's natural binding properties offer a significant processing advantage.

Processing performance

In extrusion, reducing starch often compromises kibble integrity. Research conducted at Kansas State University indicates that low-bloom collagen increased expansion while preserving the durability of the kibble. Collagen functions as an effective nutritional binder in high-protein pet foods, allowing formulators to lower reliance on starch without increasing breakage.

Collagen addition furthermore improves extrusion efficiency by lowering motor load, reducing required water, and enabling higher shaft and knife speeds with only minimal process adjustments. These improvements enhance dough flow, cohesion and cut quality, resulting in more consistent and stable kibble production.

Application across formats

Collagen's formulation value extends across categories:

- **Dry pet food:** Collagen acts as a nutritional binder in extruded and cold-pressed kibbles, supporting hardness and durability while replacing starch.

- **Snacks and treats:** Texture is adjustable via bloom strength and inclusion levels. Lower bloom yields firmer textures; higher bloom creates softer, elastic chews.
- **Wet pet food:** Collagen supports loaf structure, heat stability and palatability, and supports meat replacement while maintaining product quality.

Health benefits

Collagen's triple-helix structure provides strength and flexibility, making it essential for overall health. Consequently, hydrolyzed collagen (such as Hydro-P Premium) is increasingly used for its bio-functional properties, particularly in diets targeting joint health, mobility and recovery. Suitable for hypoallergenic diets and large breeds, it maintains healthy skin and coat while aiding tissue repair. Ongoing research continues to explore its role in managing osteoarthritis and reducing inflammation.

Conclusion

As pet food formulations move toward cleaner labels and lower starch levels, collagen is emerging as a strategic, multifunctional ingredient. It supports kibble structure and processing efficiency while boosting protein content and reducing reliance on traditional binders. At the same time, collagen aligns with sustainability goals through upcycled sourcing and delivers proven benefits for mobility, skin and coat health.

Curious how collagen can enhance your product's texture or nutritional profile? Contact Darling Ingredients to learn more about integrating these solutions into your formulation strategy. ♦



GlobalPETS Forum 2026

Agentic AI, social commerce and how to win back consumers

The industry gathering in Istanbul highlighted how innovation, data and shifting pet owner behaviors are shaping the future of the pet sector.



Thaís Matos
Senior Business Reporter
GlobalPETS

At this year's GlobalPETS Forum, business leaders and experts discussed how technology, innovation and a focus on the client can empower pet companies to take advantage of the present moment.

Understanding category dynamics

From a macroeconomic perspective, inflation is falling but growth is stagnant. In the pet segment, market saturation is putting pressure on consumer demand, and a particular challenge lies in reconciling the seemingly divergent trends towards luxury and affordability.

While the global gross domestic product (GDP) is expected to slow to around 3% this year, other indicators cast a more positive light on the economy. "From 2026 onwards, we expect that the global baseline is going to be driven by lowering of interest

rates as well as easing of inflation," explained Sahiba Puri, Global Insight Manager of Pet Care at Euromonitor International, opening the event.

One of the results of this scenario for the pet care market is the increasing price polarization between those who are splurging on their pets and those who are on a budget, Puri said. But instead of being cause for alarm, this forecast represents an opportunity for pet businesses to invest strategically.

Andrea Deitert, Global Insights Lead Food at NielsenIQ, gave a hint of where these businesses

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should focus their attention. “We see some really nice growth rates in emerging markets, Eastern Europe and Asia Pacific on value and volume,” she said.

However, even though North America and Western Europe show flat or declining value and volume growth rates, 81% of all dollars in the pet sector are still concentrated in these regions, making them relevant for all kinds of players.

Agentic AI: bolder use of data

Gilbert Gooijers, Chief Operating Officer of software company CM.com, and Marlou Mulders, Managing Director at Prins Petfoods, surprised the audience by introducing a new – and quite unusual – colleague: an AI agent. They went on to show how artificial intelligence can be adopted in bolder ways to use data and expertise to serve clients.

The duo opened their joint presentation by explaining that large language models (LLMs) are highly effective at predicting users’ next actions. Agentic AI uses this capability by combining LLMs with tools that enable it to act on those predictions.

Based on that, Prins Petfoods uses the input data gathered from clients via phone, mail, WhatsApp and chat to train an agentic AI model that thinks and acts



like an employee. This agent is assisting customers 24/7 and learning from their history to recommend treatments and products.

“We can also give this ability to retail stores. Systems can be present for the staff to consult about the questions that consumers ask, or we can place QR codes that consumers can scan, go to WhatsApp and talk with the agents,” Gooijers explained.

What’s needed to make AI work

Despite holding promise, Gooijers cautioned that a single channel or agent does not fit all the company’s purposes. Therefore, businesses planning to implement this technology need to establish different priorities and create distinct agents to address each of them.

Another point to be taken into consideration is that the solution must be designed for all generations – from digital natives to those who are not familiarized with technology. In other words, the complexity lies in constructing an efficient system that gives consumers access to an intuitive service. “It takes data you can trust; the agent is as good as your data is. Start with small experiments and keep progressing,” Gooijers advised.

At Prins Petfoods, there has been a notably positive impact on efficiency, according to Mulders, with smaller teams and faster execution of tasks. “Engagement with the customers is better because they don’t quit as easily as with other tools. Because our products are being sold via our partners, we don’t know exactly what the turnover is, but we hear from the market that it’s worth it,” she said.



Similar initiatives are also underway on the retail side of the pet industry, such as at KIKKA, a pet specialty chain with over 120 locations in the Baltic region. Paulius Ausmanas, Head of Export, said that the company is investing in AI solutions, with two ambassadors advancing its integration in marketing and internal processes.

The power of TikTok Shop

Another technological development that sparked interest among Forum attendees was social commerce – or how TikTok Shop can be the new frontier for brand and retail purchases.

Remy Beaumont, founder and CEO of social commerce agency Z Media, explained that TikTok is now responsible for 68% of all global social commerce. This turns the platform into a “full retail channel”, as product discovery and final purchase happen at the same time.

It is also driving a shift in how brands communicate with clients. “What TikTok is really doing is taking word of mouth and applying it at scale. So, creators are now the new sales force. Not celebrities, not influencers, but everyday people who understand relevance and the culture of the platform,” Beaumont explained.

When it comes to pet care social commerce, he said that people’s interests revolve around three main trends: routine and habit content that makes goods feel essential; problem and solution demos; and identity and community. “Pet owners very often self-identify by breed, values or lifestyle, and they buy products that reinforce that belonging,” he said.

Retail: from transactional to emotional

Jack Stratten, Director of the global retail trendsetting agency Insider Trends, described 2026 as being the year of the “always-on consumer”. This implies that businesses need to present new products every day and constantly change the offerings in their feeds to stay relevant, he said.

But this dynamic has also led to market saturation, pushing shoppers to spread their spending across more retailers. On average, they join 19 loyalty programs but engage with less than half of them.



For retailers, this concern has to be at the heart of their strategies. “If you’re going to do a loyalty program, it has to start to build a deeper connection with the customer on an emotional level. A simple transactional process won’t work unless you are the cheapest business in the world,” he stated.

To capture these shoppers, Stratten advised investing in affordable luxury supplies and in-store experiences and activations. Across the world, he said, stores are important places for product discovery in opposition to the flood of online offerings. They are also evolving into spaces where people want to create and share content, and spend quality time. “We have an opportunity as retailers to fill the social gap,” he concluded.

Pursuing innovation without losing focus

When Jean Richard de Latour left behind years of general retail to land his first role in the pet industry 18 months ago, he had one mission: to transform Tom&Co by opening new stores and placing less focus on franchises. Tom&Co, the biggest pet specialty chain in Belgium, is also present in Luxembourg, France and – since recently online – the Netherlands.

“We restarted the remodeling process of our shops. We need to be more welcoming, reward the customer journey and be on top of our assortment. We are also investing in IT, data and all our back office systems,” Tom&Co’s CEO explained.

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The pursuit of innovation without losing focus on the customer is also key for KIKA. According to Ausmanas, its focus is on offering complete assistance to clients and training staff to become experts. “We are not just retailers, we are also groomers, have a grooming academy and spa centers to offer added-value services,” he said.

Both retail groups recently launched subscription and loyalty programs and are seeing an increase in e-commerce participation. In addition, they are investing in a new, compact urban store model, with fewer products and employees, but still offering services that create a “sense of community”, according to de Latour.

Sustainability, regulation and trust

Besides growth and innovation, sustainability has become another key factor for building trust in the pet industry. “58% of consumers want more sustainable products, but they’re skeptical. Many companies are making unfounded claims about sustainable products and consumers have recognized it,” said Jim

Lamancusa, Executive Director of the Pet Sustainability Coalition (PSC).

To win over pet parents and achieve realistic goals, companies in the sector must adapt to important regulations that will come into effect in the EU. One of them is the Directive on Empowering Consumers for the Green Transition, also known as ‘anti-greenwashing’ legislation, Lamancusa explained. According to him, every EU country must have a national law on the subject by March 2026, which must be fully enforced by September.

“Under these rules, companies have to avoid false and misleading environmental and circularity claims; provide transparent, accurate evidence for all their sustainability claims; and give consumers better information at the point of sale, like on packaging and in store,” he said.

This change also brings opportunities, as forward-thinking businesses tend to benefit during transitions. “When you’re designing products, design for the strictest foreseeable regulations. If you’re doing it ahead of time, you gain loyalty. Consumers who buy sustainable products are some of the most loyal customers you will ever have,” Lamancusa concluded.

Regional focus: Middle East and Turkey

The event also delved into regional opportunities and challenges. Farah Al-Khojai, founder and Managing Director of Arab Land Trading – a pet products wholesaler, distributor and retailer – pointed out that the UAE and Saudi Arabia have the biggest pet markets in the Gulf Cooperation Council (GCC) region, which also includes Bahrain, Kuwait, Oman and Qatar.

Expats have changed pet ownership and consumption in both countries, she said, as they have deeper bonds with companion animals. “The change is not just sociological, it’s commercial. People are looking for entry-level premium brands, smaller pack sizes and functional food at mid-tier price points. It’s conscious wellness over indulging luxury,” Al-Khojai explained.

Thuyen Vu, Chief Marketing Officer at TGM Research, rounded off the presentations with a detailed overview of the market in the host country of this year’s



GlobalPETS Forum. Based on research conducted by the company in December 2025, she showed that – while declining in number – Turkish pet parents are diverse and spending more on pet care.

“Many pet owners purchase food and supplies every month, meaning it becomes part of the monthly household routines, just like groceries or utilities. And this consistency opens doors for subscription services, loyalty programs and personalized delivery services,” Vu said. Furthermore, consumers are open to experimenting in the sector, especially with innovative solutions.

Tools, technology and real connections

Turkey’s share of the global pet care industry is 0.6%, said Başar Yildirim, Chief Economist at the local offices of PwC. The country’s economic outlook is challenging, but hopeful. “We are expecting a stable trend in our current account deficit. It’s not really easy but we are applying fiscal discipline. So, I hope it will be positive in the upcoming period,” Yildirim concluded.



This year’s GlobalPETS Forum showed that tools and technology can – and should – be used to optimize processes and meet new market demands. Above all, however, understanding pet parents and fostering real connections with them remains fundamental in an industry whose growth is rooted in the bonds between owners and their pets. ♦

The next GlobalPETS Forum will take place in Lisbon in January 2027.



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Non-stop dogwear scoops GlobalPETS Forum Award 2026

The Norwegian dog accessories manufacturer has been recognized for its innovation and expansion strategy, with enhanced global distribution now in the pipeline.



Thaís Matos
Senior Business Reporter
GlobalPETS

Non-stop dogwear has been in the harness market for 18 years, producing highly adaptable products to improve dog mobility. Last year, the company invested in technology to launch functional accessories and expand its operations beyond Europe.

Winning combination

This combination of both innovation and commercial scalability helped the company claim the GlobalPETS Forum Award 2026 on 21 January. The business has been recognized for product quality, strong consumer love, smart and creative market innovation and its broader impact on the industry.

“It’s a great pleasure winning this prize. I wanted the whole company to be here together with me because this is a team effort,” said Chief Operating Officer Fredrik Skjøldt as he accepted the accolade. Other nominees for the award, which was presented at a ceremony in Istanbul during the 26th edition of the GlobalPETS Forum, included the Brazilian lifestyle brand Zee.Dog, Dutch manufacturer Q-Petfood, Italian pet food producer Schesir and Polish accessories maker Fiboo.

Serving the needs of active dogs

Headquartered in Brøttum, about 170km from Oslo, Non-stop dogwear was founded in 2009 by Kristoffer Grøtan Olsen, Tonje Wahl Evensen, Sebastian Plur Nilssen and Fredrik Skjøldt to serve the specific needs of performance dogs.

Skjøldt showed the audience a video of how dogs are integrated into every step of the operation, from early tests in the office to outside sports and activities with employees. “We believe that active dogs are happy dogs, so we want to help create a world where every dog can be active and have fun. That is our vision and what we are working for,” he added.

Partnerships and launches

To support its marketing activities, the manufacturer collaborates with global ambassadors, especially those active in sports. In the company’s own words, they “engage in a wide range of activities at all levels, from weekend adventurers to Olympic athletes and world champions”. The Non-stop dogwear ambassador community covers 37 countries and includes more than 1,000 representatives worldwide.

The accessories are designed to be durable, ergonomic and provide comfort and performance for dogs. The brand’s main target group includes athletes and their sporty canine companions, participants in activities such as canicross, skiing, trekking and running, as well as security forces and rescue teams.

In 2025, Non-stop dogwear released a total of 45 products with either new functionality or new colors. According to the company, one of its biggest launches last year was a “compact, ultralight and reliable” dog rescue sling in partnership with the Norwegian Search and Rescue Dog Association. This supports the transportation of injured or exhausted animals.

The manufacturer also introduced a full-body windproof and waterproof raincoat. It then used the same technology to develop other products including a drying coat and a cooling vest designed to maintain body temperature during warmer weather.

Keeping pace with global demand

In 2020, 30% of Non-stop dogwear’s products were exported. Five years later, this figure had jumped to 77%, with availability in 108 countries.

Over the past two years, the company has expanded into emerging markets, particularly Asia and South America. That decision was driven by demand. Traditionally it was a B2B-focused company, with its

direct-to-consumer (D2C) channel in existence purely to guarantee access for anyone who wanted one of its accessories. Then the company noticed an increase in D2C orders coming from outside Europe.

It has already seen good results in countries such as China, Taiwan, Japan, Thailand, Colombia, Brazil, Argentina, Chile, Panama and Costa Rica. Although purchasing power is lower in these areas, the number of consumers and their pet populations make them attractive, Skjøldt said.

“We invested in 2024 and part of 2025 to reshape the firm from being a European company to a worldwide player. In 2024, we put up warehouse and management companies in the US and then in Asia,” the COO told GlobalPETS. The company’s priority in 2026 is to build a distribution network to strengthen its presence in these regions.

Wellbeing, quality and sustainability

Although the 2026 pipeline is more focused on consolidating infrastructure, the firm is expected to launch a professional version of one of its main products later this year. Skjøldt did not disclose specifics about upcoming launches, but said that some products will prioritize performance, while others will focus more heavily on sustainability.

According to the COO, commercial sales have increased as consumers have become more conscious of pet wellbeing and quality. “The longer durability of the products is also part of a sustainability effort because it uses better materials and improves circularity,” he explained. He also hinted at new colors coming soon.

Non-stop dogwear recorded sales of approximately €22.5 million (\$26.7M) last year, with forecasts projecting a rise to €27 million (\$32M) in 2026. ♦





The building blocks of sustainability in the pet industry

Environmentally conscious growth is being propelled by both legislation and economic necessity, and savvy companies are focusing on innovative ingredients, better designed packaging and more resource-efficient operations.



Thaís Matos
Senior Business Reporter
GlobalPETS

As sustainability moves from a niche concern to a strategic priority in the pet food industry, PETS International takes a look at initiatives that are beginning to deliver measurable returns. However, some experts warn that uneven progress is creating a widening gap between industry leaders and those still laying the groundwork.

Possible competitive advantages

Whereas sustainability was once viewed primarily as a cost or reputational exercise, it is now becoming a source of competitive advantage in the pet food industry. There are some examples of how manufacturers are achieving operational and financial

gains by improving their environmental footprint. These range from adapted ingredient sourcing strategies to a stronger focus on the efficient use of byproducts, recycled materials and renewable energy.

Developing new ingredients

Alternative proteins have emerged as one of the most advanced and widely discussed solutions for enhancing the sustainability of pet food. Options such as insect-based and cultivated meat and fermented ingredients are no longer experimental concepts but are beginning to reach the market thanks to growing interest from researchers and manufacturers.

Some of these alternatives are already gaining acceptance among consumers, according to Jenny Mace, Animal Welfare Researcher and Visiting Fellow at the University of St Andrews in Scotland. She notes

that studies consistently suggest cultivated meat-based pet food is currently the most popular and sustainable alternative among dog and cat owners.

However, Mace argues that broader public surveys are still needed to better understand attitudes toward novel options.

Several recent product launches underscore the momentum in the alternative protein space. These include cultivated chicken pet food developed by UK brand Meatly, brewed protein from US firm Bond Pet Foods and cultured protein derived from fermented carbon by Calysta, which has been adopted by German brand Marsapet in its recently launched MicroBell dog kibble.

Plant-based options gain traction

Significant sustainability gains can also be achieved through plant-based proteins – a segment that is relatively small but expanding rapidly as both emerging and established brands introduce vegetarian and vegan ranges.

The vegan pet food category, in particular, is expected to see substantial expansion in the coming years. Billy Nicholles, a researcher at Bryant Research – a UK social science firm specializing in alternative protein – describes its current growth rate as notably fast, pointing to rising consumer awareness and increasing industry investment as key drivers.

Eco-conscious sourcing

Another promising avenue lies in improving how traditional proteins are sourced. Allison Reser, Director of Sustainability and Innovation at the Pet Sustainability Coalition (PSC), highlights the possibility of sourcing MSC-certified fish, for example.

Meanwhile, fermentation technologies and regenerative agricultural practices are increasingly viewed as viable ways to reduce environmental impact while maintaining nutritional standards. “Regenerative agricultural practices – such as soil restoration, improved biodiversity on farms and carbon sequestration – offer opportunities to make existing supply chains more resilient,” according to industry association UK Pet Food.

Utilization of byproducts

A focus on the effective use of animal byproducts – in other words, all parts of livestock that are not edible or not sold as food – is another way to achieve sustainability gains in the pet food industry. For Reser, this presents a “huge opportunity”.

Expanding the use of high-quality animal byproducts could “strengthen circularity within the food system”, agrees UK Pet Food. In an innovative example, in December 2025 Korean manufacturer Suchang unveiled Orange Dogs, a dog food made from byproducts of the citrus processing industry. According to the company, the product will be rolled out in selected markets, including the US, Japan, China and Europe.

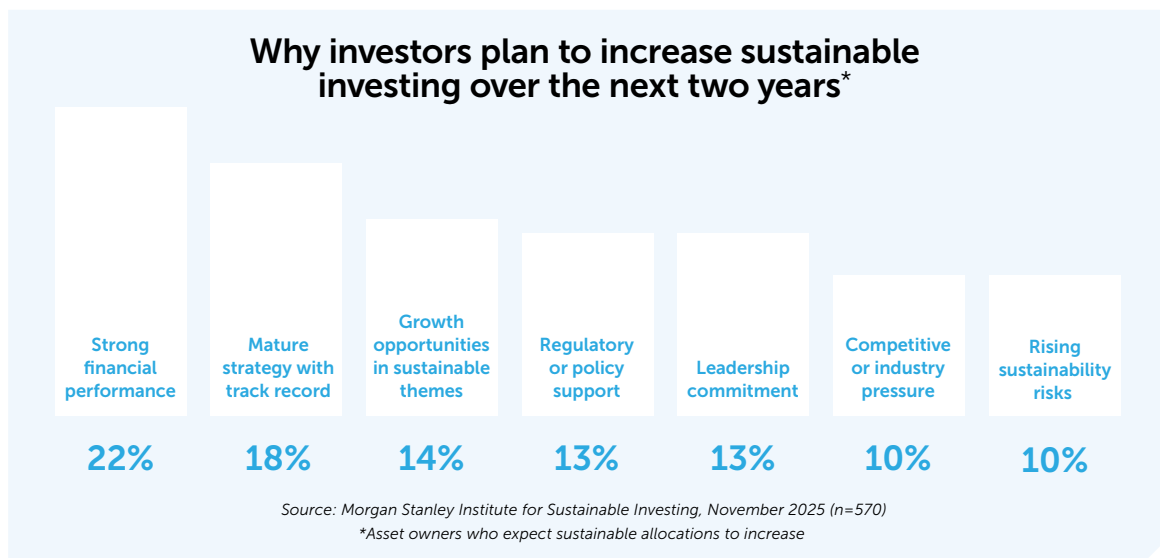
In the case of byproducts, messaging and education are important. “As public understanding grows, there is potential to better communicate the environmental and nutritional value of byproducts, helping to shift perceptions from waste to resource,” states UK Pet Food. “It also means moving the conversation away from ideas such as ‘human grade’ – which reflect human food preferences – towards recognizing what is safe and nutritionally appropriate for the species we are feeding.”

The role of legislation

PSC’s Reser notes that increasingly stringent regulations will accelerate the adoption of alternative proteins and upcycled ingredients, which offer vastly lower carbon footprints than traditional livestock protein sources. As an example, she mentions the EU’s updated Product Environmental Footprint Category Rules (PEFCR) for pet food, which are standardizing how environmental impact is measured, compelling companies to track and report their emissions from farm to bowl.

Sustainable packaging is another area in which regulatory clarity – in combination with consumer pressure – is driving tangible progress in the pet food industry. For example, Extended Producer Responsibility (EPR) laws have been [▶ SEE NEXT PAGE](#)

Options such as insect-based and cultivated meat and fermented ingredients are no longer experimental concepts but are beginning to reach the market.



introduced in several European markets. As this legislation continues to expand and mature, packaging is increasingly viewed not only as an environmental challenge but also as a strategic lever.

Incentivizing improved design

Under EPR policies, producers are financially responsible for the end-of-life management of the packaging they place on the market. These schemes typically impose fees based on the weight, material composition and recyclability of bags, cartons and boxes, creating a direct cost incentive for brands to undertake redesigns with sustainability in mind.

“Pet food brands face per-pound fees for their packaging, with eco-modulation benefits that result in lower fees for more sustainable packaging,” explains PSC’s Reser. Eco-modulation refers to the adjustment of EPR fees to reward better design decisions, penalizing hard-to-recycle materials while favoring those that are widely recyclable.

Packaging innovations

Against this regulatory backdrop, major pet food players have accelerated their efforts to improve packaging sustainability. In 2025, Mars introduced 100% recyclable pouches across parts of its portfolio, while Nestlé Purina partnered with plastics manufacturer Berry Global Group to incorporate mechanically recycled PET (rPET) into its cat treat canisters.

Smaller and regional players are also moving quickly. French manufacturer Saga Nutrition recently collaborated with sustainable packaging specialist Mondi to replace non-recyclable, multi-material plastics with recyclable mono-material solutions – an approach that aligns closely with EPR requirements and recyclability guidelines across Europe.

Operational advances

Pet industry players can also seize opportunities to create value through efficiency by improving their operational design. This can include investing in energy-efficient facilities, waste heat recovery, water reuse systems and optimized logistics such as electric vehicle fleets and route planning, says Reser.

These practices translate “directly into lower operational costs and better margins over the long term”, she adds, citing the example of the US animal feed ingredients producer Alltech. The company has invested \$5.89 million (€5.04M) in efficiency and renewable projects since 2023, such as capturing and reusing waste heat from energy-intensive processes, and the expansion of solar arrays.

In 2024, Alltech already saw a 26% reduction in greenhouse gas (GHG) emissions compared to its 2021 baseline, according to PSC. The generated savings are expected to pay back on the investment in two to 3.5 years’ time.

Another example comes from the British pet food manufacturer Forthglade, which installed a solar array of 2,000 panels at its factory in Dartmoor, in the southwest of England. The array is expected to reduce energy costs by generating 25% of the electrical power needed for the site.

Leaders go beyond compliance

Reser sees a division in the industry between companies that are excelling in terms of their efforts and others that are still in the foundational stage of the process.

“The leading companies are implementing sustainable solutions well beyond what is required by law, establishing multi-year targets, investing heavily in supply chain transparency and reducing Scope 1, 2 and 3 emissions,” she explains. The others are, according to her, still “focused on compliance” and short-term solutions.

Scope 1 emissions include natural gas usage for heating, ventilation and air-conditioning (HVAC) systems as well as GHG emissions from fleet vehicles, while Scope 2 emissions come from purchased electricity. Scope 3 emissions relate to all indirect emissions throughout the value chain.

Ambition 2030 roadmap

To help reduce the environmental impact of the British pet food sector, UK Pet Food recently unveiled its Ambition 2030 roadmap. The document establishes some goals for companies, such as contributing to a 50% reduction in emissions across the agrifood supply chain by 2030, nature restoration and the adoption of non-deforested commodities.

There is a division in the industry between companies that are excelling in terms of their efforts and others that are still in the foundational stage of the process.

The association has also prepared a toolkit that provides practical guidance on how to progress sustainability in line with Ambition 2030. This is aimed at driving action among all types of businesses – from those just starting out on a sustainability journey to those who are further along the maturity curve and seeking to accelerate impact.

Avoiding the costs of inaction

It is important to act now to avoid the “cost of inaction”, as PSC describes it, illustrating this with the example of regenerative agriculture. “Because soil health restoration requires a three- to five-year lead time, waiting to act leaves brands vulnerable to a lack of resilience in crop management, resulting in lower yields and increasingly unpredictable input costs,” explains Reser.

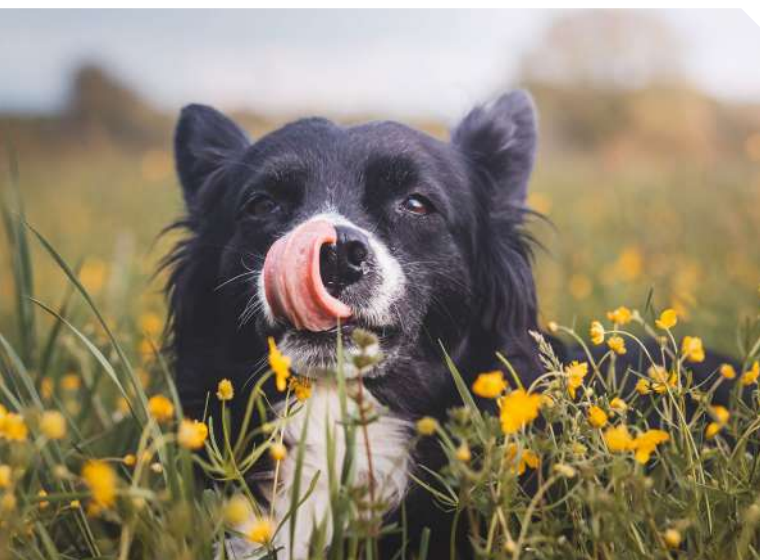
She adds that every dollar invested in climate adaptation and resilience can generate up to \$19 (€16) in avoided losses, as per the data from the World Economic Forum (WEF). “A circular economy approach can make the supply chain more secure and less exposed to climate-related disruptions,” comments Reser.

Investment reaping rewards

There is clear interest in wider climate-related efforts. According to the Morgan Stanley Institute for Sustainable Investing, following a 2025 survey of 900 institutional investors worldwide, 79% of asset managers and 86% of asset owners expect the proportion of sustainable assets in their portfolios to rise over the next two years.

Researcher Nicholles echoes this, highlighting that investments in sustainable pet food align with “emerging expectations” from investors, regulators and retailers.

Although the pet industry still faces challenges in scaling solutions, initiatives across the markets show that investment is beginning to pay off. This is increasing the willingness among manufacturers to develop and explore new opportunities to drive the low-carbon transition, benefiting companies, consumers and society as a whole. ♦



EU anti-greenwashing law: what you need to know

How will the Empowering Consumers for the Green Transition Directive affect pet industry players when it comes into force this year? And what can you do now to prepare for it?



Gianluca Managò
LCA & Circular Design Consultant

Terms like ‘eco-friendly’, ‘sustainable’ and ‘biodegradable’ have long appeared on pet products, often without clear definitions or proof. From September, a new European directive will change that, allowing only claims backed by recognized ecolabels or independent verification.

Reshaping the claims landscape

The EU’s Empowering Consumers for the Green Transition (ECGT) Directive becomes enforceable on 27 September 2026. It will fundamentally reshape how environmental claims can be used in the region’s pet industry.

The ECGT ends the ambiguity of product claims. The directive bans generic environmental claims unless a company can prove “recognized excellent environmental performance”, which means an officially recognized ecolabel or equivalent independent verification. Sustainability language is no longer a creative exercise. It becomes a regulated statement that must be grounded in verifiable evidence.

For pet brands, particularly those that rely on environmental positioning, this marks a strategic shift that cannot be postponed.

Preparation: initial steps

The first step in preparing for the ECGT is to conduct a complete audit of every platform where consumers encounter your claims. It is no longer sufficient to merely review the physical packaging. The ECGT applies equally to websites, online retailers, social media channels, influencer content, trade materials and in-store communications.

This process often reveals far more environmental messaging than companies expect. Legacy web pages, outdated Amazon descriptions, influencer posts from years ago and even creative choices (green color palettes, leaves, arrows arranged to suggest circularity) may be interpreted as environmental claims. Under the ECGT, these implicit cues must be treated with the same scrutiny as explicit statements.

Sustainability language is no longer a creative exercise. It becomes a regulated statement that must be grounded in verifiable evidence.

Review through a regulator's lens

The goal is to re-examine your brand through the eyes of a regulator rather than a marketer. What impression does the consumer reasonably receive? Would they infer that the product has superior environmental performance? The directive is designed precisely to prevent impressions that exceed measurable reality.

One type of environmental messaging is especially risky: broad claims that imply whole-product environmental excellence when only part of the product offers any benefit (Recital 11, Directive (EU) 2024/825).

A real-world example

Imagine a pack of dog treats advertised as 'eco-friendly' because the pouch contains recycled plastic. Under the ECGT, this is no longer acceptable. The directive requires companies to avoid implying product-wide advantages when the environmental benefit applies only to one component.

Instead of 'eco-friendly treats', the compliant version becomes 'packaging made with 15% recycled LDPE'. The difference is substantial in regulatory meaning.

Precedents for enforcement

Although the ECGT will not become enforceable until later this year, many instructive precedents have already been set in Europe for how regulators assess misleading environmental claims. Several are relevant to pet products.

For instance, France's Directorate General for Competition Policy, Consumer Affairs and Fraud Control (DGCCRF) has repeatedly examined misleading biodegradability and compostability claims across a range of consumer goods.

Its findings emphasize that claims are misleading whenever typical disposal conditions do not allow the advertised environmental benefit to occur. This principle applies directly to compostable pet waste bags, where disposal infrastructure varies widely and the claimed organic breakdown is often not supported.

Additionally, some legal actions recently emerged outside Europe concerning issues that mirror the ECGT's logic. Investigations by American law firm

One type of messaging is especially risky: broad claims that imply whole-product environmental excellence when only part of the product offers any benefit.

Pollock Cohen have questioned whether bags marketed as 'compostable' or 'environmentally friendly' actually decompose under real consumer conditions or simply under controlled industrial tests. In several cases, products held certifications that were technically correct but irrelevant to everyday disposal practices.

A six-stage roadmap to ECGT compliance

Stage 1: claims mapping

The ECGT defines an environmental claim as "any message or representation [...] including labels, symbols and brand names" (Amendments to Directive 2005/29/EC) that suggests environmental impact. Companies must therefore map all claims across packaging, websites, Amazon listings, social media, influencer scripts and trade sheets. Many pet brands will discover outdated 'eco-friendly' language or iconography still present in online listings.

Stage 2: claim classification

Mapped claims must be evaluated against the ECGT's restrictions. Generic terms like 'eco-friendly', 'green' or 'biodegradable' cannot be used unless a product demonstrates "recognized excellent environmental performance".

This stage clarifies which claims can remain unchanged, which require precise rewording, which require evidence, and which must be eliminated. For example, a pouch labeled 'sustainable packaging' may need to become 'packaging made with 50% recycled cardboard', unless an accredited ecolabel supports the broader claim.

Stage 3: evidence collection and inventory

The directive requires evidence that is accurate, up to date and verifiable. Companies must therefore gather supplier documentation, test results, life-cycle assessments or certifications. For instance, a pet waste bag claiming compostability must demonstrate that it breaks down under realistic consumer disposal conditions, not just in industrial composting processes that consumers cannot access.

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Stage 4: messaging and packaging update

With evidence in place, brands can update claims to ensure they are clear, relevant and unambiguous. This often means replacing broad adjectives with precise statements about materials, manufacturing or end-of-life pathways. Where benefits apply only to packaging, the claim must state this explicitly and without overreach.

Stage 5: team training

Marketing, design, customer service and sales teams must understand ECGT rules to avoid inadvertent non-compliance. Many instances of greenwashing arise not from deliberate misrepresentation but from well-intentioned content created without regulatory awareness.

Stage 6: internal review

To maintain compliance, companies need a structured pre-launch review process for all future environmental communication. This includes documentation procedures, approval workflows and regular updates of any claim dependent on changing suppliers, formulations or packaging.

What will the ECGT really change?

For pet industry executives, the most important shift is not theoretical scrutiny. It is how the ECGT changes three very practical aspects: which claims survive, which products you invest in and how you work with retailers.

First, not every claim is worth saving. For some stock-keeping units (SKUs), the cost and complexity of gathering evidence or securing certification will outweigh the marketing value of a generic 'green' tagline. Many companies will quietly retire vague claims on lower-volume or legacy products, reserving substantiated environmental language for a smaller number of 'hero' lines where they can genuinely demonstrate excellent performance.

Developing ECGT-native products

Second, new products will need to be 'ECGT-native' from day one, because it will be much harder to bolt on sustainability claims at the end of development. Formulation, packaging format, supplier choice and end-of-life design will need to be planned with evidence in mind. A new 'compostable' pet waste bag, for example, will have to be designed around realistic

disposal scenarios, not just laboratory test conditions or marketing aspirations.

Third, retailers will expect proof, not promises. As national authorities begin to transpose the ECGT into national law by March 2026, large retail chains are likely to tighten their own requirements to avoid being associated with misleading claims on the shelf. For pet suppliers, that means environmental messaging will increasingly be part of listing negotiations and line reviews.

Having clear documentation and conservative, defensible claims will become a commercial advantage, not just a legal safeguard. The ECGT raises the bar for everyone. The brands that lead the next phase of sustainable pet care will be those that choose their claims deliberately, substantiate them rigorously and treat environmental messaging as a regulated business asset, not as a nice story to tell. ♦

How ready is your company?

A useful way to think about the ECGT is as a very simple readiness test. By the time the directive applies, a pet company should be able to answer 'yes' to these three questions:

1. Do we know exactly where every environmental claim appears for every SKU?
2. Can we show credible, up-to-date evidence for the claims we've decided to keep?
3. Do we have a process that stops new non-compliant claims from slipping into the market?

If the answer is 'no' to any of these, the ECGT isn't just a legal risk – it is a sign that your brand narrative and your environmental performance are drifting apart.

From here, the path is clear: build a single, owned inventory of all claims, decide which ones remain strategically worth defending, and create a documented route to gather the evidence you lack. Then embed cross-functional reviews so that every future piece of packaging or marketing is compliant by design, not by correction.



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