PETS International

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SEP 2026

EURO VISION

What the EU's new parcel fee means for cross-border commerce

FEELING THE BENEFITS

Exclusive insights into enrichment products

STEPPING UP ON SUSTAINABILITY

Pet companies move beyond compliance

REGIONAL UPDATES

Focus on the Spanish & Portuguese markets

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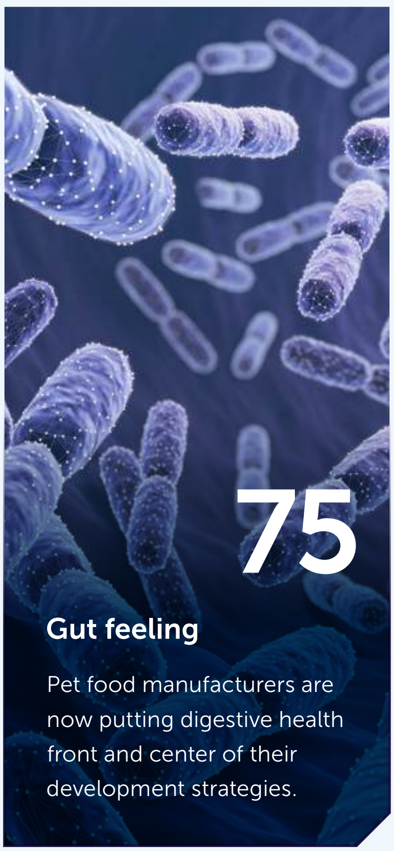

And more:

Navigating new borders

With SuperZoo in the US and Pet Fair Asia, alongside strong M&A activity in recent months, the summer has been anything but quiet for the pet industry. GlobalPETS has been following these business developments closely, with extensive coverage. If you missed anything, you can catch up with the latest news on our website.

Cross-border e-commerce has become essential to the expansion strategy of many pet brands. At the same time, the rapid growth of low-cost products entering the European market is making it increasingly difficult for companies to compete solely on price.

In this issue, we take a deep dive into the changing mechanics of European cross-border trade following the introduction of the EU's €3 customs duty on low-value parcels in July.

What has been the impact of the measure so far? How are major platforms and pet suppliers adapting to it? And will it push Asian e-commerce giants to invest more in regional fulfillment models in Europe? We try to answer these questions and more.

We also consider how pet markets are evolving on the continent, turning our attention to Southern Europe to explore the sector in Spain and Portugal and hear directly from retailers operating across the Iberian Peninsula.

Wishing you an inspiring read.

David Palacios Rubio
Editor-in-Chief

> **Adaptability is about the powerful difference between adapting to cope and adapting to win.**
>
> MAX MCKEOWN, BRITISH AUTHOR

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Pet insurance in the US hits new peak

The US pet insurance market reached a record high in 2025, with in-force gross written premiums hitting $5.7 billion (€4.9B), according to the North American Pet Health Insurance Association (NAPHIA). The number of insured pets grew by 9% year-over-year to nearly 7 million, representing a 4.3% penetration rate.

Dogs continue to dominate, accounting for 84.5% of premiums, though cat insurance premiums climbed by 33.1% to a record $880 million (€755M). Average annual premiums rose across most products, especially those with embedded wellness. Gastrointestinal conditions remained the most common cause of claims for both dogs and cats.

European retailers pioneer new store formats

Fressnapf | Maxi Zoo recently debuted its urban store concept in Germany, opening a 115sq m location in Munich. The compact format offers a curated product range tailored to urban shoppers, along with digital services such as click-and-collect.

This follows recent urban store launches in Warsaw, Lyon and Copenhagen. The European pet retailer first introduced the concept in 2025 with stores in France and Denmark.

Meanwhile, Croatian group Pet Network International (PNI) is testing autonomous, checkout-free retail in Bulgaria under its Dr. Stefanov brand. The shop utilizes a mobile app and QR codes for store entry and product scanning, providing a frictionless experience without traditional staff-operated checkouts as PNI aims to 'futureproof' its strategy.

Beyond kibble: inside Europe's D2C pet food market

A new report analyzing 113 European direct-to-consumer (D2C) pet food brands reveals the UK leads the market with 21 labels, followed by France, Poland, Germany and Spain.

While dry kibble remains dominant and offers the lowest daily feeding cost, investor interest is heavily skewed toward fresh and cooked brands, which attracted 73% of the €811 million ($946M) raised across the sector.

To build loyalty, 66% of European D2C brands now offer subscription-first or optional models, providing added value through personalization.

Survey reveals popularity of pet-friendly policies

New research by Mars shows that 55% of European employees say they would consider switching jobs if a workplace allowed pets.

Romanians are the most open to accepting a position in a pet-friendly workplace, with 65% of respondents saying they would. Greek and Swiss citizens followed at 64% each, ahead of Hungarians (63%) and Swedes (60%).

Younger workers are much more likely to factor their pets into employer decisions and daily routines. Among current pet owners, 65% said such policies would influence their choice of employer.

Zooplus launches German marketplace

After rolling out in France two years ago, online retailer Zooplus has launched a new marketplace in Germany. The platform adds 10,000 new products to its offering in the country, with pet accessories making up 65% of the expansion. Orders are fulfilled directly by third-party sellers, who undergo a strict vetting process.

Zooplus uses AI-powered tools to enhance product descriptions and plans to continue scaling the marketplace model across its European footprint to broaden customer choice. The German firm is exploring opportunities to extend these benefits to marketplace products.

Cats overtake dogs as Taiwan’s top pets

For the first time, cats have surpassed dogs as Taiwan’s most popular pets. Data from the Ministry of Agriculture estimates the cat population jumped 32.8% since 2023 to 1.74 million, while dog ownership fell slightly to 1.46 million.

This shift highlights a trend toward multi-cat households and urban preferences. Additionally, new laws mandating domestic cat registration took effect in 2026.

The overall shift helped drive retail value sales of pet products in Taiwan up 12% to $922.7 million (€791.3M).

Firms turn to share buybacks to reward investors

Pet players are diversifying their capital allocation strategies, balancing traditional dividends with share buybacks to increase returns. A PETS International analysis of 14 publicly traded companies reveals that more than half, including Zoetis, Spectrum Brands, Central Garden & Pet and Trupanion, currently have buyback yields higher than their five-year average.

Several players recently activated their first-ever share repurchase programs. Freshpet announced a $150 million (€128.6M) authorization, while Symrise launched a €400 million ($466.6M) program.

Other companies are expanding existing mechanisms; Chewy’s board approved a $500 million (€428.6M) increase and BARK authorized a new $40 million (€34.3M) program funded by free cashflow.

Meanwhile, traditional dividend policies are also evolving. Pets at Home rebased its dividend to a 50% payout ratio, redirecting the remaining cash to share buybacks. Ultimately, as valuations fluctuate and some pet-related companies reach multi-year lows, increasing numbers of firms are allocating more capital to share buybacks to utilize excess cash or correct unsatisfactory stock prices.

Gulf trade agreement set to boost UK pet food exporters

After four years of negotiations, the UK and the Gulf Cooperation Council (GCC) have secured a new free trade agreement. The deal aims to eliminate the GCC's 5% import tariff on pet food and reduce trade barriers for British exporters across the bloc.

This agreement is expected to significantly boost the competitiveness of UK pet food manufacturers in key Middle Eastern markets, providing a streamlined export process and unlocking new growth opportunities in the region.

UK Pet Food, the trade association representing the pet food industry, believes the agreement has the potential to create new opportunities for British pet food manufacturers.

VAFO acquires Pets Deli to fuel growth

Czech manufacturer VAFO Group has acquired Berlin-based D2C brand Pets Deli. The acquisition aims to combine Pets Deli's strong digital presence with VAFO's manufacturing, R&D and procurement capabilities.

VAFO plans a gradual integration of production and intends to double Pets Deli's current €40 million ($46.6M) annual revenue by 2030.

The Czech group is also exploring opportunities to expand the brand into other European markets, aligning with its strategy to reach €1 billion ($1.2B) in total revenue by 2029.

Pet retailers grow revenue, but profitability concerns investors

Stores including Pet Valu, Pets at Home, Musti Group and Petco show stock values trading as much as 60% to 90% below their historical peaks.

Despite stable or growing top-line revenue, these retailers are struggling to expand gross profit margins. This margin compression is driven by a dual challenge: consumers are resisting price hikes and seeking value, while retailers battle escalating costs across logistics, rent, labor and inventory.

To adapt, they are strengthening omnichannel capabilities, optimizing store networks and employing AI-enabled software for productivity gains. Retailers are also introducing smaller pack sizes and revamping loyalty programs to retain cautious shoppers.

While macroeconomic volatility persists, industry experts note that stabilizing pet acquisition rates and easing inflation may eventually improve the overall outlook.

PET INDUSTRY FACT FILE

DATA INSIGHT

$14.78

is the average amount pet parents in Ecuador spent on pet food in July 2026. The government has recently added the category to the national consumer basket.

NEW APPOINTMENTS

Hill's Pet Nutrition

The pet food manufacturer promoted Keith Wilkinson to Senior Vice President, Global Customer Development, and appointed Carolyn Belloni as SVP, US Customer Development.

Pets at Home

The UK retailer has named Sarah Findlater as Chief People Officer for the Pets Group, covering Pets at Home, Vets for Pets and Pets Insurance.

Mars

Christina Ruggiero is the company's new Regional President, Mars Pet Nutrition North America.

TOP 3 INVESTMENTS

Hong Kong pet food startup **Buddy Bites** secured $4.2 million (€3.6M) Series A funding to grow subscriptions, launch cat food and enter the Taiwanese market.

Multinational food corporation **Cargill** invested €5.4 million ($6.1M) in a pilot extrusion plant at its food innovation center near Brussels.

South Korean pet health and beauty manufacturer **Cosmax Pet** allocated $28.8 million (€24.7M) for a new plant in Jeungpyeong, 100km from Seoul.

TOP WEB NEWS

TRIXIE outlines growth strategy

German pet company has been acquired by Central Garden & Pet for €400 million ($458M).

LATEST NEWS

EU customs and VAT reforms

Turning point for businesses selling into Europe

As the bloc moves towards a more digital and controlled trade environment, pet companies must reassess their export strategies. Is direct shipping still the right model?

Andy van Esdonk
Tax Adviser, EU VAT
Bird & Bird

Europe's new trade regulations will reshape how pet businesses operate across the region. As customs duties, handling fees and VAT rules change, companies must reconfigure their market entry strategies to secure long-term growth.

Significant developments

At the center of this transformation are two major EU regulatory initiatives: the EU Customs Reform and the EU VAT in the Digital Age (ViDA) package. Together, these revisions will introduce significant changes to how pet businesses sell, distribute and manage compliance across Europe, with measures extending beyond 2030.

For pet firms, the reforms will impact the cost base and margins for selling into Europe and the way consumers experience purchasing pet products online, as well as more broadly affecting market entry and operational considerations.

The immediate consequences follow from the EU Customs Reform, which abolished the €150 ($173) customs duty exemption for the import of small parcels into the EU on 1 July 2026.

As a temporary measure (pending the rollout of the EU's data-driven customs framework), the EU introduced a new fixed customs duty of €3 ($3.50) per item (i.e. per tariff line) on the business to consumer (B2C) sale of small parcels imported into the EU as of the same date.

This is a real cost impact for any pet companies currently selling into Europe through cross-border e-commerce. It is also a timely reminder to step back and ask a more fundamental question: what is the right model for a pet business that is selling products into the EU over the next two to five years?

The immediate changes (and costs)

The €150 customs duty exemption for B2C distance sales of small parcels was originally introduced as an administrative simplification, but the continued growth

It is worth noting that for certain pet product categories the new €3 fixed customs duty may represent a higher cost than the ad valorem duty it replaces.

of international e-commerce has put high pressure on the EU's customs and VAT systems and has distorted the level playing field between e-commerce and traditional retail.

Now, each small parcel up to €150 imported into the EU through B2C distance sales will attract a fixed customs duty of €3. For example, a parcel with five identical products counts as one item, whereas a parcel containing two different products counts as two items (i.e. each distinct product type within a small parcel will attract a fixed customs duty of €3).

For pet businesses shipping mixed assortments of products, the distinction matters, and the costs can add up quickly. A brand shipping 50,000 items a year into the EU may face around €150,000 ($173,083) exposure, on top of which even another €30,000 ($34,616) in VAT may be due (assuming a 20% VAT rate). These are real operating expense issues for businesses.

It is worth noting that for certain pet product categories – particularly accessories attracting low or zero customs duty rates – the new €3 fixed customs duty may represent a higher cost than the ad valorem duty it replaces, making it essential for pet companies to model their exposure on a product-by-product basis rather than assuming the fixed customs duty rate is universally cheaper. Furthermore, pet businesses need to be aware that applying preferential trade agreements may not always be an option to mitigate the €3 flat customs duty.

Additionally, a new EU-wide customs handling fee is expected to be introduced in autumn 2026. The exact amount and application date are still to be confirmed, but €2 ($2.30) per parcel from November 2026 is currently anticipated. Several EU member states are not waiting for the EU-wide measure and have introduced or are set to introduce their own national handling fees in the interim.

▶ SEE NEXT PAGE


Where Quality Takes Root
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Pork
MULTI protein
Venison
Raw Ham
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GHEDA
DAL 1950
Transparency begins at the source.
UNICA GHEDA® makes the origin of its main ingredients visible and accessible, helping consumers make informed choices and retailers build lasting trust.
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How will this impact consumer experience?

For pet businesses, how the new EU customs duty and handling fee will be managed is a very relevant consumer experience decision. Absorbing the duty protects the consumer, but impacts margins, while passing the duty on risks a price increase or an unwelcome surprise at delivery for the end customer (even more if increased with VAT that then compounds the cost).

How the EU-wide customs handling fee will interact with the customer journey remains to be seen pending its introduction.

What about ViDA?

Running in parallel with the EU Customs Reform are the EU's ViDA changes. This is the most significant overhaul of the EU VAT system since the introduction of the single market in 1993. Where the customs reforms are largely about the cost of getting goods into the EU, ViDA is about how VAT is managed, invoiced and reported once those goods have arrived in the EU.

ViDA has three pillars. Two are directly relevant to pet brands. First, mandatory e-invoicing and digital reporting for cross-border B2B transactions in the EU are introduced as of 1 July 2030, with several EU member states rolling out domestic requirements earlier.

Second, a new Single VAT Registration concept rolling out from 2027 allows businesses to manage EU VAT through a single registration in one EU member state, potentially reducing VAT compliance costs significantly.

The third pillar covers expanded deemed supplier rules for short-term accommodation and passenger transport platforms, and so is not expected to impact the pet sector.

Rethinking market entry and operations

For pet businesses currently shipping individual parcels directly to EU consumers from outside the bloc, the duty and handling fees are based on a per item/parcel basis.

Going forward an alternative may be to shift from direct parcel shipping to building local unsold stock in the EU in order to fulfill orders from there. Pet businesses should therefore consider their corporate structure for the EU and whether other models such as local fulfillment partners and/or local distributors may be more appropriate or economically viable.

The immediate priorities are to quantify customs duty and handling fee exposure and assess whether a current market entry structure needs to be overhauled, revised or updated.

Market entry can, for example, take place through a third-party logistics provider and a fiscal representative as a first step. Longer term it can be achieved through incorporating a local EU entity, provided that is the best step commercially.

The right business model depends on sales volumes, whether third-party platforms or distributors are used, and the extent to which a pet business's local VAT and customs infrastructure needs to support growth ambitions in the EU.

While designing a market entry and operational model, the relevant ViDA questions should also be answered. For example, which e-invoicing requirements apply to transactions with platforms and distributors, as well as in which country or countries VAT registrations need to be live.

What pet businesses need to do now

The immediate priorities are to quantify customs duty and handling fee exposure and assess whether a current market entry structure needs to be overhauled, revised or updated.

On the ViDA side, the timeline for compliance is longer, but current and future e-invoicing obligations and Single VAT Registration simplifications all feed into market entry and operational decisions that need to be made now.

In practice, designing the customs and VAT requirements and aligning these with the requisite legal frameworks and ERP systems is where businesses may require input from specialist legal counsel. ◆

EU's parcel duty puts imports under pressure

Falling parcel volumes from Asia and rising costs could accelerate the shift towards regionally based fulfillment and distribution models.

David Palacios Rubio
Editor-in-Chief
GlobalPETS

Since coming into effect in July, the €3 ($3.50) customs duty on low-value EU imports has already started to reshape the e-commerce and logistics landscape. Early data indicates a drop in parcel volumes, impacting air-freight capacity and changing how goods are entering the single market.

What's likely to happen?

According to the European Commission, parcels with a declared value of up to €150 ($175) – those affected by the new measures – accounted for 97.9% of total parcel volume moving into the EU in 2025. The picture could look very different this year, however, as early indications suggest that the new charges are already affecting cross-border parcel flows.

The Commission estimates that up to 65% of small parcels that entered the EU in 2025 were undervalued to avoid import duties. Official data shows that the average declared value of these small packages is just €8.82 ($10.28) per item.

PETS International has reached out to all major postal services across Europe, including those in Germany, France, Spain and Italy, to assess the impact of the new customs duty. Some didn't have figures available to share, while others did not respond to our requests.

Tracking the numbers

Austria's national postal company handled a total of 232 million items in 2025. During the first half of this year, Austrian Post was receiving an average of 1.5 million parcels per month from Asia. In July, the company registered a 30-40% decline in parcel volumes arriving from the Asian region, with the vast majority originating from China.

This substantial drop has prompted the company to revise its second-half performance outlook. Even though it achieved a 9% volume growth in total parcel volumes in the first half of 2026, it now expects parcel volume growth to slow significantly to 2-3% for the July to December period. It attributes this to the new charges.

Dutch postal service PostNL says that international e-commerce volume had already come under pressure. Driven mainly by parcels from Asian webshops, this fell by almost 15% in the first half of 2026. In Sweden, declared low-value shipments fell by 21% between July and August. Swedish Customs reports that 151,043 parcels from countries outside the EU were declared during that period.

In Ireland, An Post reports that there has been "some impact" on items arriving in Ireland from outside the EU. "However, larger retailers and shippers have moved quickly to adjust, with many now fulfilling orders locally or transitioning to Irish-based fulfillment models," a spokesperson explains. The EU's €3 charge is applied alongside An Post's €6.95 ($8.10) customs administration fee.

The Belgian gateway

Belgium also felt an immediate impact of the new duty – due to its role as a key logistics hub for Asian shipments entering Europe. Liege Airport is one of Europe's main gateways, particularly for parcels arriving from Asia. Nearly 20% of all EU e-commerce customs declarations are processed there, making the site a critical entry point for low-value cross-border shipments into the single market.

In 2025, Belgian customs processed 1.3 billion e-commerce declarations at the airport, equivalent to 3.6 million per day. According to the latest official data, e-commerce parcel volumes fell by 24% in July 2026 compared with the same month in 2025. The decline since June 2026 is even more significant – 41%.

Belgium's Federal Public Service Finance authority has confirmed to PETS International that this was equivalent to approximately 1.26 million fewer low-value parcels worth up to €150. The number of declarations in July 2026 fell by 52% compared with July 2025. When compared with the previous month of this year, it has dropped even more – by 67%.

Air freight also affected

Prior to the policy's implementation, aviation consultancy Rotate had estimated that up to 30% of EU e-commerce air cargo imports could be affected over time, representing the equivalent of nearly 5,000 freighter flights annually. In the first 48 hours after the new customs duty came into force, direct China-to-Europe freighter capacity had already dropped by 18%.

The European Commission estimates that up to 65% of small parcels that entered the EU in 2025 were undervalued to avoid import duties.

This decline moderated slightly to a 14% capacity reduction across the first full week of implementation. Logistics experts expect e-commerce flows to decrease in the short term – as providers adjust their processes and networks – but believe that demand will pick up again toward the fourth quarter of 2026.

Additional country charges

As cross-border shopping continues to put pressure on domestic retailers in many sectors, several governments across Europe are exploring the options of putting additional charges on low-value parcels, with approaches varying significantly from country to country.

Research conducted by the Austrian Retail Association shows that the shift to consumer spending abroad is costing the country's retailers nearly €570 million ($664.6M) in gross sales and €171 million ($199.4M) in gross value added annually. This results in a GDP decline of approximately €212 million ($247.2M). The country is now planning a €2 ($2.33) parcel tax on certain domestic deliveries of goods purchased through distance selling, to come into effect on 1 October 2026.

The Netherlands has also considered implementing its own €2 handling fee but has decided against it for the time being. The Dutch Customs Administration authority confirmed in June that it would wait for the EU-wide handling fee, which is expected from November 2026.

Discussions have been taking place in Italy on the possible introduction of a national tax on small parcels, which would apply on top of the EU customs fee. If enacted, the measure would bring total direct charges to €5 ($5.82) per parcel category for cross-border shipments entering Italy, adding further complexity to pricing and logistics planning across the single market.

Higher costs for e-commerce giants

The new customs rules are also forcing major e-commerce platforms to take a good look at – and possibly adapt – their pricing, compliance and logistics strategies, with some warning that higher costs could ultimately be passed on to consumers. ▶ SEE NEXT PAGE

In a filing to the Hong Kong Stock Exchange, Chinese online fashion retailer SHEIN formally identified regulatory changes to *de minimis* thresholds – which allowed duty free entry and simplified clearance for low-value shipments – as a material risk factor. Europe represented 35.4% of total net revenues in 2025.

The document filed on 26 July says: "We expect to pursue a wide range of options in response, including increasing our prices in Europe to offset a portion of the increased costs, and there might be a short-term adverse impact on our sales volume in Europe as a result."

Seller responsibilities

The changes are also shifting greater responsibility for customs compliance onto e-commerce traders. Under the new EU customs framework, web platforms and retailers conducting distance sales into the EU are responsible for customs formalities and payments, with financial penalties possible for operators that repeatedly fail to meet their obligations.

Chinese e-commerce group Alibaba has said that its cross-border e-commerce platform AliExpress is focusing on improving pricing transparency at checkout.

To reduce cart abandonment and the risk of packages being rejected upon delivery, the platform has integrated tariff calculations into the shopping cart and incorporated applicable compliance costs into the final price shown to consumers.

Consumers shouldn't foot the bill

BEUC – The European Consumer Organisation – is concerned that some postal and delivery operators may try to pass the new costs on to consumers after purchase. The EU Consumer Rights Directive requires traders to provide consumers with the total price when they purchase items, including taxes and applicable delivery or postal charges.

"Consumers should not foot the bill for the new €3 fee. The reform is clear: from July, it's importers and not consumers who are paying for customs duties. Yet we're already hearing that some operators may try to pass these costs on at the doorstep," BEUC's Director General Agustín Reyna says.

Benefits of local fulfillment

The new rules are also accelerating the shift towards EU-based fulfillment. PostNL has seen an increasing number of international webshops shipping orders from distribution centers within the EU, allowing goods to be delivered to consumers without being subject to the new import duty at the point of sale.

An example of this is Chinese-owned marketplace Temu, which is expanding its network of European-based merchants whose products are already held within the EU. Through its Local Seller Centers, the platform is supporting local businesses and entrepreneurs with locally registered entities, inventory and fulfillment capabilities. The company has set a long-term target of generating 80% of its European sales through local sellers and local fulfillment. ◆

Swedish shoppers look to buy closer to home

Findings from a survey earlier this year commissioned by Tullverket, the Swedish Customs Service, revealed that 14% of the respondents had said they would stop shopping from countries outside the EU completely after the introduction of the new EU duty. This figure rose to 23% among women aged 65-84.

More than two in 10 (24%) said they would continue shopping from non-EU countries, although less frequently. Residents of Stockholm were particularly likely to cut back on purchase frequency (30%). Another 41% said the customs duty wouldn't affect their shopping decisions at all. This was even higher among consumers aged 18-34 and those living in larger urban areas, at 49%.

Close to a third (33%) of Swedish consumers shop online from non-EU e-commerce platforms, with 12% doing so a few times per quarter and 19% a few times per year. Those who shop frequently are mostly men aged 50-64 (18%) and households with children (18%). The survey polled 1,068 Swedish adults between 14 and 21 May 2026.

Cross-border e-commerce broadens pet trade horizons

New fulfillment partnerships and infrastructure investments are reshaping the global pet industry, helping businesses overcome barriers to wider expansion.

Thaís Matos
Senior Business Reporter
GlobalPETS

As online marketplaces push to grow their reach and logistics networks get more sophisticated, the pet industry is becoming increasingly borderless. Although global e-commerce is creating new and exciting opportunities for pet companies, brands must still navigate regulatory complexity and fulfillment challenges, as well as local variations in consumer trends.

300% revenue growth

From a worldwide perspective, cross-border e-commerce revenue has tripled in just five years, according to market research platform E-commerce Database (ECDB). The figures indicate that cross-border trade is becoming a structural growth driver for online retail globally, with regional gaps having closed in that time.

The Americas are still dominant in overall value, having gone from $43 billion (€37B) sales in 2021 to $98 billion (€84B) in 2026. ECDB attributes this growth to the success of the major players there, such as Amazon (especially in North America) and Mercado Libre in Latin America.

Meanwhile, Asia demonstrates the biggest revenue growth: 193% in five years, reaching $79 billion (€68B) in 2026. "This surge is powered by a mix of regional e-commerce platforms such as Shopee and Lazada, alongside Chinese giants like Pinduoduo and Alibaba," ECDB says.

Zooming in on Europe

Cross-border e-commerce is not only accelerating across the Americas and Asia, but also increasing in Europe. The region posted the second-highest growth rate (+176%) and the second-largest cross-border revenue, at $80 billion (€69B). Strikingly, small and medium-sized enterprises (SMEs) in the EU sold more than €40 billion ($47B) on Amazon alone in 2025, setting a record for SME revenue on the marketplace.

According to Amazon, almost half of that – €17 billion ($19B) – came from cross-border exports, representing a year-on-year (YoY) increase of 13%. Intra-EU exports grew at a similar rate, by 12.5% YoY, to €13.5 billion ($16B).

The positive figures from Amazon indicate that the rise of cross-border commerce is reshaping opportunities for smaller businesses in Europe, with marketplaces becoming a key gateway to international customers.

▶ SEE NEXT PAGE

Western markets remain the primary focus for most brands in Europe. Friedrich Schwandt, CEO of ECDB, states that Germany, France, the Netherlands and the UK continue to attract the most attention as they benefit from mature e-commerce ecosystems and strong consumer spending on pets.

However, brands are increasingly looking beyond the region's largest markets. "Southern and Eastern European markets are more on the radar, particularly for brands that have already established a foothold in the core markets," he says. Schwandt adds that once a company has built the infrastructure for cross-border trade, the marginal cost of adding a market drops "considerably".

Streamlining UK-EU trade

Ian Walker, founder and CEO of UK-based company 3P Logistics, has noticed a growing interest from pet businesses in international e-commerce, mainly between the UK and the EU. "We're working with several pet brands to increase their reach through cross-border and through-channel extensions," he tells PETS International.

According to Walker, pet companies are seeing higher volumes in both one-off consumer purchases and recurring weekly or monthly subscription orders. In recent years, the company has helped pet gear producer DOG Copenhagen and German manufacturer TRIXIE Pet Products to establish fulfillment operations in the UK, enabling next-day delivery.

Once a company has built the infrastructure for cross-border trade, the marginal cost of adding a market drops considerably.

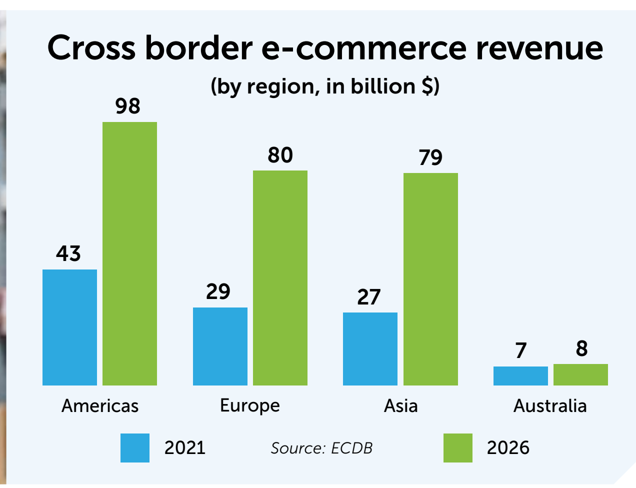
In his view, the biggest challenges to scaling international operations still involve the complexities of duties, taxes, customs delays and currency exchanges. Therefore, he is hoping that legal simplification, such as the EU Customs Union reform, will streamline trade and stimulate more companies to participate in cross-border e-commerce.

Building bridges between Europe and China

The growth of cross-border e-commerce is reshaping the way companies approach expansion, logistics and market access beyond Europe, too. This is resulting in new strategic partnerships.

Earlier this year, for example, German logistics company DHL Group and JD.com – one of China's largest online retailers – signed a Memorandum of Understanding (MoU). The move happened after JD launched its European online retail platform Joybuy in the UK, Germany, France, the Netherlands, Belgium and Luxembourg.

The idea behind the partnership is to collaborate on innovative logistics and e-commerce initiatives, aiming to create integrated solutions and support growth in both China and Europe. DHL and JD's logistics arm aims to offer fulfillment services and help companies benefit



from preferential customs duties and VAT schemes for business-to-consumer (B2C) shipments. DHL says that the initiative will also help German pet suppliers who are looking to expand into the Chinese market.

Supporting German brands

Last May, JD's cross-border program welcomed German retailer Müller Holding as a member. Müller operates more than 900 stores across Europe, offering a wide range of products spanning beauty, health, household goods, stationery, toys and pet care.

Through the partnership, Müller established a presence in JD's duty-free shop in Hainan, southern China. Meanwhile, JD provides the logistics and service infrastructure needed to sell Müller's products in China through both online and offline channels.

Rethinking opportunities in China

Other recent moves by major international companies in China itself suggest a shift in approach. Rather than competing directly with local players, global businesses are increasingly focusing on enabling cross-border trade and supporting sellers.

For instance, after a seven-year absence from China's online marketplace sector, Amazon returned to the country with a different strategy. Instead of resuming direct sales to Chinese consumers, the company launched warehousing and distribution services aimed at helping local businesses expand internationally.

Since April, Chinese sellers looking to reach overseas markets (particularly the US) have been able to store inventory in bulk at Amazon's Global Warehousing & Distribution (GWD) facility in Shenzhen, southeastern China. When ordered, the products are then sent to the company's US fulfillment network.

Strengthening LatAm trade corridors

In a similar move, Latin America's leading e-commerce player Mercado Libre opened its first fulfillment center in China last December. The online retailer is already utilizing it to ship to its major international markets, including Argentina, Brazil and Mexico.

"We expect the China-LatAm corridor to be an area of incremental growth and investment in 2026 as we scale our fulfilled-from-China model," the company said in a letter to shareholders. The Uruguay-headquartered company invested further in its cross-border trade business in 2025 to make "it easier for customers to access free shipping, multiple-seller shopping carts and incentives that brought new sellers and selection to the platform", it added.

In addition to strengthening trade corridors, these investments focus on offering faster deliveries and less costly operations for business partners, to meet the growing demand in digital commerce.

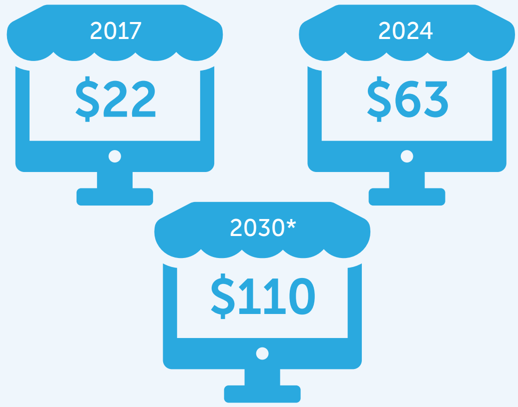
Emphasis on research

To optimally seize the opportunities for international expansion through marketplaces and third-party logistics providers, pet companies would be wise to do their homework. ECDB cites the research phase as an important – but often overlooked – step, highlighting the importance of understanding the actual market structure and how segments are performing in each country.

"Brands that enter a new market without that kind of category-level visibility often position themselves against the wrong trend," Schwandt says. A local strategy for product compliance, pricing and positioning complements the key areas of focus for businesses seeking to capitalize on this rising market, he concludes. ◆

Global pet supplies e-commerce market

(in billion)



*Source: ECDB *Forecasted*

Shaping the future of pet care, across every pet

Versele-Laga becomes Versele: one master brand, one mission and a clear ambition for 2032.

Thomas Dewinter
Senior Marketing Manager
Versele
versele.com

Every day, more than 25 million pets worldwide rely on Versele. From a canary in a city apartment to a performance horse, caring for such a diverse range of pets is not just what the company does, it defines who it is. With nearly a century of expertise and an active presence in more than 95 countries, Versele has grown from a Belgian family business founded in 1932 into a trusted international partner in pet nutrition and care.

Today, it is the only manufacturer in the world developing nutrition and care products for such a broad range of pets. For customers, this means access to wide-ranging category expertise, deeper consumer insights and innovation that reaches beyond individual segments.

From expertise to innovation

At the heart of Versele is a clear purpose: to unleash the extraordinary in every pet. Bringing that purpose to life starts with a highly integrated model. Versele develops and produces 95% of its 2,000+ products in-house, supported by its own veterinarians and nutrition experts. This combination of science, consistent quality and supply reliability creates a clear advantage for B2B partners: one partner combining scale with flexibility, innovation with operational excellence and expertise across multiple categories.

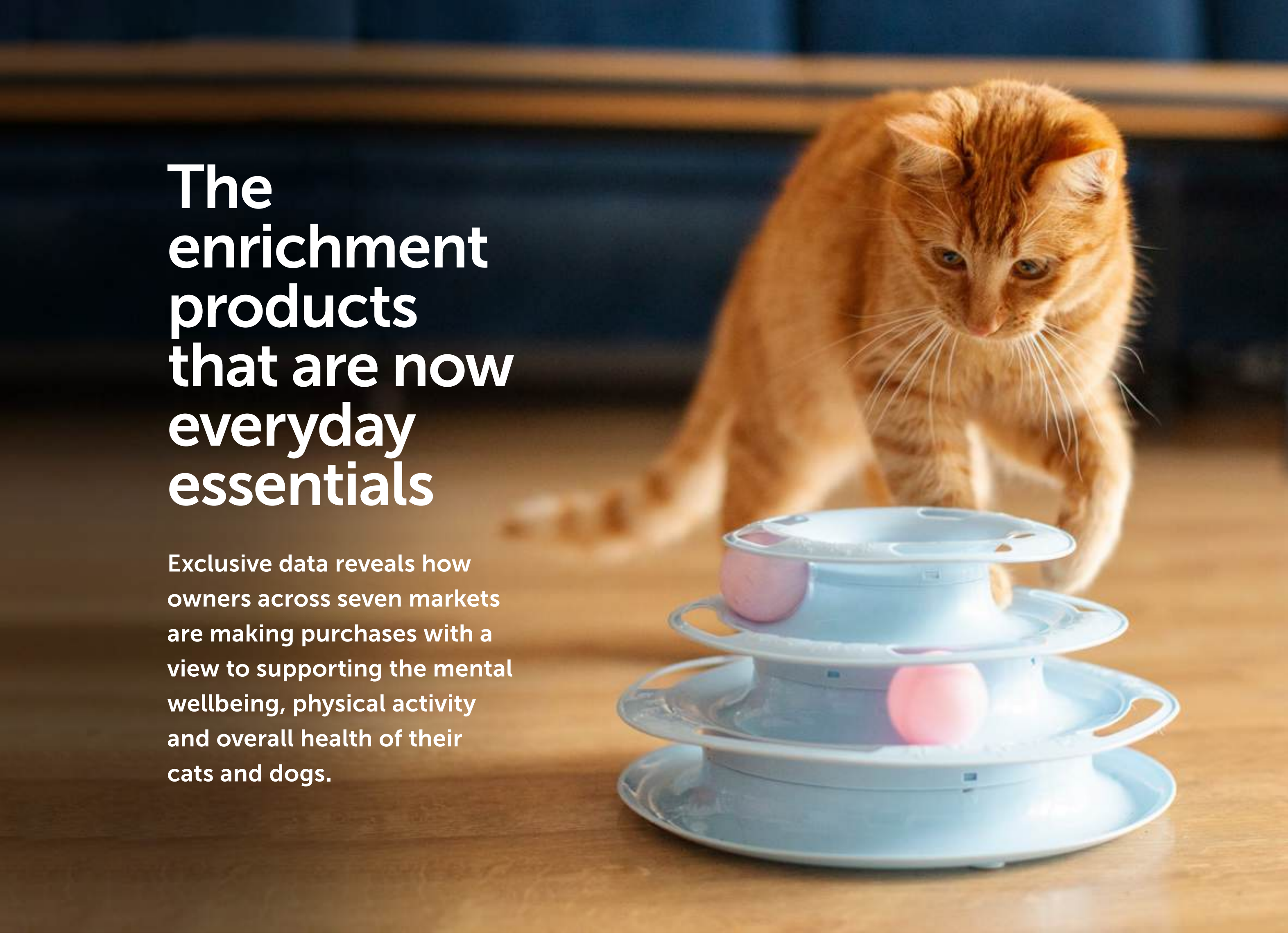
As pets become full members of the family, expectations around nutrition, health and wellbeing continue to rise. The company's cross-category expertise helps it translate changing consumer needs into relevant innovations and new growth opportunities. At the same time, sustainability is embedded in how Versele operates and creates long-term value: from local sourcing and biodiversity initiatives to reducing CO2 emissions.

A new chapter

The company evolved from Versele-Laga to Versele this summer, bringing its expertise, heritage and ambitions together under one strong master brand. The evolution goes far beyond a new name or visual identity. By strengthening Versele across all pet categories, the company aims to build a stronger connection with pet parents while continuing to grow its trusted category brands.

The name Versele, rooted in the family's heritage, remains core to its strategy: a proud family-owned company with a long-term vision and a distinctive position in a market largely dominated by American and other non-European multinationals.

Versele's ambition is clear: to become a market leader in nutrition and care for all pets by 2032, building on nearly a century of expertise and working together with its customers, partners and colleagues. Because by being extraordinary together, Versele believes it can achieve more for pets and pet parents worldwide. ◆



The enrichment products that are now everyday essentials

Exclusive data reveals how owners across seven markets are making purchases with a view to supporting the mental wellbeing, physical activity and overall health of their cats and dogs.

Thaís Matos
Senior Business Reporter
GlobalPETS

Whether it's for stimulating their minds or exercising their bodies, toys are found in most homes with pets. In fact, a survey conducted by Yummypets, powered by Loop, and PETS International found that just 1% of cat owners and 2% of dog owners don't buy any of these items.

Widespread use

Based on responses from 2,708 pet owners across Australia, Brazil, Canada, France, Mexico, the UK and the US, the findings show that enrichment and wellbeing are key purchase drivers. Owners primarily seek products that provide mental stimulation (27%), help reduce stress or anxiety (25%) or encourage physical activity (14%).

Dogs go for chews...

Chew toys are the preferred option for more than four in 10 dog owners (41%). This is followed by fetch toys such as balls and frisbees (34%) and interactive toys (23%). Puzzles or mind-stimulating products, as well as treat-dispensing toys, are also popular among dog parents, with a fifth (19%) of the respondents buying each of these.

Responses about which types of toy pet owners purchase are, in general, very similar in all seven countries. The exception to this is French dog owners, who appear to buy fewer enrichment toys from four of the five categories analyzed.

Other notable dog owner data focuses on toy type. Canadians are fonder of interactive toys (30%) and of puzzles and brain-stimulating objects (24%) than the average respondent. UK owners (26%) also buy

Stimulating physical exercise is the goal for 24% of cat parents, a rate that falls to 14% among dog parents.

significantly more puzzles than average and purchase more (24%) treat-dispensing toys, as do Australians (25%). At 14%, Mexicans buy treat dispensers less than average.

... while cats favor balls

Balls and small toys dominate preferences among cat parents (40%), followed by interactive items such as lasers and wands (33%) and catnip-based toys (31%). Cat owners also say they spend money on electronic or automated toys (17%) and puzzle feeders (13%).

Looking at the responses in all seven countries, the most interesting takeaway is that US owners buy the most enrichment products for their cats, and Mexicans are the least likely to purchase this type of toy. This applies to four out of five types of enrichment toys. Respondents from Australia, Brazil, Canada, France and the UK show similar purchasing behavior in all four categories.

There are differences when it comes to buying catnip-based toys. Here, the rates for Australian and Brazilian respondents are significantly lower than the average, at 21% and 25% respectively. Mexicans also show less interest in this category, at 22%. And while, on average, three in 10 cat parents buy toys like these, this purchasing rate rises considerably in the US – 45% of consumers respond positively there.

Purchasing frequency

The number of frequent enrichment toy shoppers – or those who buy one every two to three months – is highest overall (33%), followed by occasional shoppers (every four to six months), at 30%. Then come those who buy something only once a year (14%), followed by consumers who, on the contrary, do so monthly or even more often (13%). Finally, 6% of respondents say they rarely buy enrichment products.

At first glance, the findings don't seem to show many significant differences between different countries. But looking at purchases made often or very often (at least once in six months – an average of 76%) compared to purchases done much less often (once a year or rarely – an average of 20%), it's the respondents from predominantly English-speaking countries who are most likely to buy more frequently than those from other countries.

Looking at the purchases within these larger categories, the more frequent buyers are in the US, at 85%, followed by the UK (78%). The other English-speaking countries Australia and Canada follow at 75%. Brazilian and Mexican respondents buy slightly less frequently (74% and 73%), and France has the lowest number of frequent shoppers at 71%.

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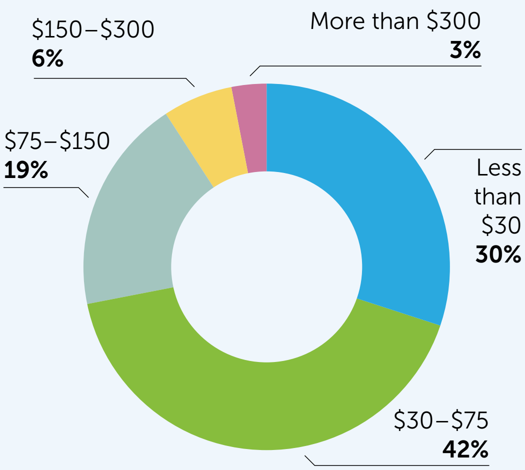
Top 3 enrichment products bought by dog and cat owners

Dog owners			Cat owners		
1	2	3	1	2	3
Chew toys	Fetch toys	Interactive toys	Balls or small toys	Interactive toys (wands, lasers)	Catnip-based toys
41%	34%	23%	40%	33%	31%

Source: Yummypets-PETS International, February 2026 (n=2,708)

Average annual spend on enrichment products



Source: Yummypets-PETS International, February 2026 (n=2,708)

What buyers are looking for

Cat and dog owners have different motivations for buying these products – some of them clearly linked to the differences in characters and living situations of the type of pet involved. For example, while 27% of cat parents opt for enrichment products to prevent their indoor pets getting bored, the same number of dog parents spend money to provide mental stimulation. Only 16% of the cat-owning respondents give this reason.

These contrasting cat and dog purchasing motivations can be observed in all categories. For instance, while improving independence when the pet is alone is a choice for 12% of dog parents, only 6% of cat parents buy for that reason. Similarly, 25% of dog owners seek to reduce stress or anxiety with these purchases, while this drops to 16% among cat owners.

On the other hand, stimulating physical exercise is the goal for 24% of cat parents, a rate that falls to 14% among dog parents. Owners of dogs give two other motivations for enrichment spending: reducing destructive behavior (11%) and providing training support (5%).

Contrasting priorities in the Americas

The research findings do indicate some regional trends. One example is preventing boredom for indoor cats, which is a bigger concern in North America (34% on average for the US and Canada) than in Latin America (20% on average for Brazil and Mexico).

The opposite is the case when owners want to reduce stress or anxiety in their pets, whether cats or dogs. Latin Americans are the most concerned (with an average of 31%), while North Americans and Australians are the least interested for this reason (15%).

European countries don't follow any obvious patterns in their purchasing motivation. While pet owners in the UK are more than averagely keen to provide mental stimulation for both cats and dogs, French owners stand out for their above average interest in promoting physical exercise for their cats.

How much are they spending?

US pet owners are the biggest spenders, with 14% of buyers spending more than $150 (€130) on enrichment products in a year, compared with a 9% average. Overall, almost one fifth of the respondents (19%) fall within the upper-middle spending bracket – between $75 (€65) and $150 (€130). This spending amount is higher than average among Australians (26%).

The majority of the respondents spend within the lower-middle range – between $30 (€26) and $75 (€65) – an amount spent by over four in 10 (42%) owners and spread more or less evenly across the seven countries. And nearly a third of pet parents (30%) spend less than $30 (€26). This amount of spending is more frequent in France, at 36%.

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Acceptable pricing levels

In terms of price per unit, 49% of pet parents consider between $11 (€9.5) and $25 (€21.5) the most acceptable price range for enrichment products. Led by Canadian and UK pet owners, another 21% think these products should cost even less, at under $10 (€9).

Looking at the higher ranges put to the respondents, just over a quarter of them (27%) are willing to pay more than $26 (€22), but the majority (67%) would prefer the price to be no higher than $35 (€30).

Outlook for the near future

Overall, one in five (21%) consumers expect to increase their spending on this pet care category over the next 12 months, while the majority (66%) say the amount they spend is likely to stay the same. Higher spending is expected, in particular, by Brazilian owners (33%), followed by Australians (26%).

The expectation is quite different in Canada and France, as respondents from these countries have the highest hopes of maintaining their current spending levels. Finally, only 4% of pet parents expect to spend less on these products, with an even distribution across the seven countries.

US owners buy the most enrichment products for their cats, and Mexicans are the least likely to purchase this type of toy.

Rewarding innovation

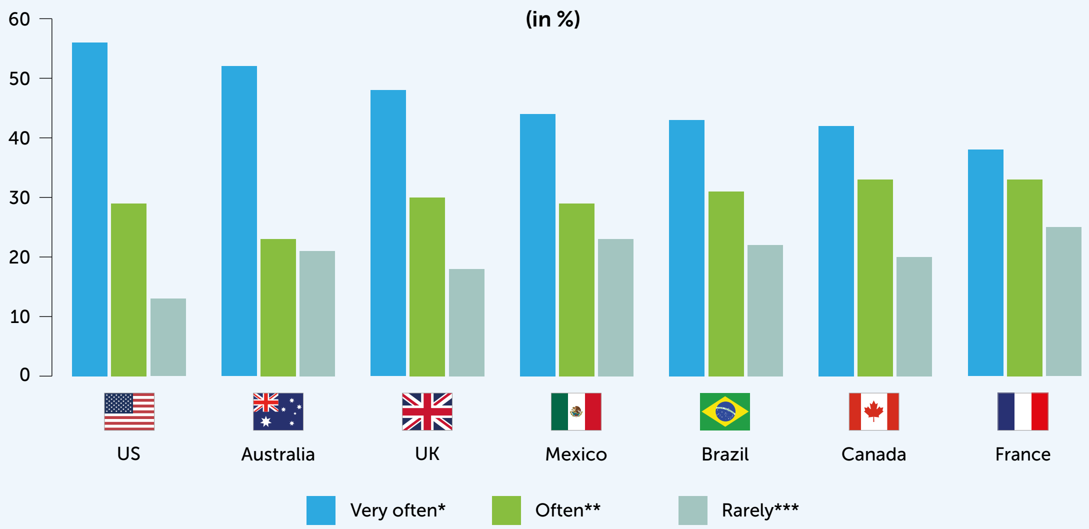
A positive sign for the industry is that pet owners are inclined to support technological advances. When asked if they're willing to pay more for innovative or 'smart' enrichment products, the majority answer that they are, divided between those who are definitely prepared to do so (17%) and those who would depending on the benefits (48%). Brazilian and Mexican responses are the most positive in this respect.

While a quarter (25%) of the respondents would perhaps consider spending more on an innovative product, especially in Canada and France, only 7% of all the respondents say they wouldn't be willing to do so, with a stronger "no" given by French pet owners (15%).

The results of the survey show that enrichment toys serve different purposes for various kinds of pet owners. But there is, in general, always room in their annual budget for purchases, even among those who would like to pay less for a product. ◆

Enrichment product purchase frequency

(in %)



Source: Yummypets-PETS International, February 2026 (n=2,708)
**Monthly or more often + every 2-3 months   **Every 4-6 months   ***Once a year or less often*

The push to make pet toys last longer

Businesses are looking to new materials and methods to reduce waste, extend product life and justify premium prices.

Diana Dominguez
Business Reporter
GlobalPETS

In a category built on repeat purchases, a pet toy that endures may seem like a contradiction. However, manufacturers increasingly see durability as an opportunity to build trust, boost positioning and reduce environmental impact. As sustainability expectations rise, companies are exploring novel materials, improved designs and circular solutions.

Environmentally aware owners

Today's consumers are more environmentally conscious than ever, and their demands increasingly extend to the products they buy for their pets.

For instance, the number of consumers who value recycled or eco-friendly components in toys and enrichment products increased from 13% to 17% between 2025 and 2026, according to the annual survey conducted by Yummypets, powered by Loop, and PETS International among over 2,000 pet owners across seven countries. Moreover, in both those years, durability was ranked as the second most important feature valued in such products (by seven out of 10 respondents).

To meet these expectations, manufacturers are focusing on a mix of strategies – from extending product lifespans through improved designs and higher-quality materials, to incorporating sustainable sourcing.

Why longevity matters

Discussions around sustainability often focus too heavily on materials while overlooking the benefits of product longevity, according to Tymur Tsasidze, International Sales Director at Ukrainian pet toy maker COLLAR Company.

He notes that every manufacturing process carries a "carbon debt", including raw material extraction, production energy, packaging and logistics, with those impacts repeated every time a product is replaced. "If a dog destroys five cheap 'biodegradable' toys in a year, it results in five cycles of production, packaging, shipping and eventual disposal," he says.

Enhancing durability

In the UK, family-owned Ancol Pet Products is not only producing durable toys made from 100% recycled content, but also incorporating animal psychology into product design. "The very short lifespan and destruction of dog toys is often due to the dog's boredom factor. We have developed a

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range of toys that stimulate the dog, therefore reducing the destruction of the toy and lengthening its lifespan," says a company spokesperson.

California-based dog toy and accessories maker ZippyPaws notes that while pet toys have traditionally been viewed as impulse purchases, buyers are increasingly evaluating products based on brand reputation, durability and sustainability.

This shift led the company to expand its use of eco-friendly materials, but without compromising on quality. Product longevity has been maintained through design improvements by "avoiding weak points in the toy, reinforcing pull points, adding a strong fabric lining, and more", Jen Glaser, co-founder and Vice President at ZippyPaws, explains. "Some of these enhancements cannot be seen on the toy's exterior, but long-time customers trust our quality."

Short-term vs long-term sales impact

Manufacturers could be forgiven for thinking that longer-lasting products might lead to fewer repeat sales. However, Tsasidze believes that customers who understand the long-term value are willing to pay a premium price.

His colleague Anastasiia Kuzmenko, R&D Director at COLLAR Company, adds that manufacturers are also exploring sources of recurring revenue beyond replacement purchases. One example is an app that helps pet owners get more value from the toys by using them not only for play, but also as fitness and enrichment tools.

According to Spencer Williams, CEO of Montana-based pet products manufacturer West Paw, durability does not reduce customer demand, but changes the reason people return. "They may choose another size, shape or play experience, or add products for enrichment, chewing, fetching and feeding," he says. "For retailers, durable products can mean greater trust, fewer complaints and stronger long-term loyalty."

Beyond virgin plastic

While longevity can certainly contribute to sustainability, material choice remains important and manufacturers are seeking alternatives to virgin plastics. Williams says recycled plastics and textiles, natural rubber, ocean-bound plastics and reclaimed production scrap are all becoming more popular.

Nylabone, a Central Garden & Pet brand, is repurposing more than 100,000lb (over 45,000kg) of ocean-bound nylon in a range featuring chew toys made with 30% reclaimed fishing nets.

Another example is West Paw's proprietary non-toxic Seaflex, which is made with 12.5% post-consumer recycled ocean-bound plastic blended with 87.5% Zogoflex, a recyclable thermoplastic elastomer (TPE). Both materials are used in the company's pet toys.

Tsasidze adds that besides recycled plastics, recycled polyester (rPET), bamboo and responsibly sourced natural fibers are also gaining traction, as they are already commercially available and increasingly accepted by both retailers and consumers. ZippyPaws' ecoZippy plush toy collection, for example, uses suede, jute, hemp and 100% cotton rope.

Meanwhile, in April, US-based dog chew brand Benebone introduced Benebone Green. In this line of plant-based chews, petroleum-based nylon has been replaced by a plant-derived nylon made from vegetable oil and starch, bonded with real bacon or salmon to keep the brand's signature flavors intact.

Offsetting higher costs

The use of sustainable materials often comes at a higher cost, however. According to ZippyPaws' Glaser, eco-friendly pet toys typically carry a 20% to 40% price premium. This is because their materials are produced in smaller volumes and have yet to achieve the same economies of scale.

To help offset higher production costs, companies are finding efficiencies elsewhere in the value chain. Ancol Pet Products, for example, has cut back on packaging, reducing both costs and environmental impact.

The number of consumers who value recycled or eco-friendly components in toys and enrichment products increased from 13% to 17% between 2025 and 2026.

Every manufacturing process carries a carbon debt, including raw material extraction, production energy, packaging and logistics.

Certifications provide validation

As consumers become more knowledgeable, they are also placing greater emphasis on product transparency. Generic claims such as 'green', 'eco-friendly' and 'sustainable' are facing growing scrutiny. Today's shoppers expect measurable evidence rather than broad marketing statements.

According to COLLAR Company's Kuzmenko, leading brands are responding by utilizing certified materials, traceable supply chains, life cycle assessments (LCAs), recycled content verification and detailed product information. This is driving wider adoption of third-party certification services, particularly in premium retail channels and international markets.

With sustainability regulations evolving, certified products may face fewer barriers to market entry. Additionally, Kuzmenko notes that while certifications alone rarely drive purchasing decisions, they provide independent verification that strengthens brand credibility.

Need for communication

"They can facilitate retailer onboarding, support compliance with procurement requirements, improve placement opportunities with major retail chains and strengthen relationships with environmentally conscious consumers," she states.

However, Nylabone points out that logo recognition alone has limited value if the meaning behind the certification is not clearly communicated.

According to Simon Lane, Director of Ancol Pet Products, retailer demand for sustainability certifications remains relatively limited, and many consumers still do not view them as sufficient justification for higher prices.

COLLAR Company expects pet owners to become more discerning and increasingly evaluate the full LCA of products. The firm anticipates this will stimulate broader industry changes, including more durable product construction and greater adoption of circular design principles, as well as growing retailer demand for verified credentials.

In terms of materials, Tsasidze sees strong long-term potential in bio-based polymers, agricultural waste fibers, advanced recyclable TPEs and mycelium-based materials that use the vegetative, root-like part of fungi as an alternative to traditional plastics and synthetic foam.

Industry outlook

This shift will bring challenges related to consumer education, production costs, raw material availability and performance consistency. "Sustainable materials must continue to meet the same safety, durability and functionality standards as conventional materials while remaining commercially viable," Kuzmenko says.

West Paw CEO Williams adds that inconsistent recycling infrastructure and the challenge of scaling circular systems across different markets will remain significant obstacles for the industry.

Manufacturers will also need to find ways to navigate the associated higher costs – especially because the category remains highly price sensitive. As data from the American Pet Products Association's (APPA) 2026 State of the Industry Report shows, pet owners are prioritizing essentials while becoming more selective about discretionary purchases, including toys. ◆

Tropical POLAND

Introducing Shrimp-UP! – Tropical's new food line for shrimp

Six new sinking-block foods target the booming ornamental shrimp market.

One of the fastest-growing trends in the freshwater aquarium hobby is ornamental shrimp keeping, which attracts more and more aquarists around the world.

Tropical has responded with Shrimp-UP! – a new food range developed for all species and color varieties of freshwater shrimp.

A complete feeding program

The line includes six foods that can be freely combined. The range has been divided into two groups: three functional foods for daily use and three 'superfoods' that add variety to the diet and support shrimp health.

The functional foods are based on Tropical's own Booster formulas and high-quality ingredients such as insects, krill and squid. Their formulations support the daily needs of shrimp, including growth, immunity, reproduction, coloration, proper molting and the development of a strong exoskeleton.

In turn, the superfood products have been enriched with algae, leaves, flowers, vegetables, herbs and phytobiotics, providing shrimp with natural ingredients that support health and proper development.

The entire line was developed with user convenience in mind. The foods come in the form of sinking blocks, which make it easier to feed small crustaceans and do not contaminate the substrate.

The products are available in two packaging options: handy 10g sachets and 45g tins. This makes it easy to tailor the offering to the needs of various customer groups. An additional advantage is the clean ingredient list, free of artificial colorants, flavor enhancers and preservatives.

Retail opportunity

For pet stores, Shrimp-UP! is not only an attractive new product but also a real opportunity to increase sales. The complete line of six products helps raise the average shopping cart value, and the clear distinction between functional foods and superfoods makes it easier to recommend additional products. Additional support includes point-of-sale (POS) materials, a ready-to-use display stand, consistent marketing communications and a social media campaign prepared by Tropical.

Shrimp-UP! is an offering for stores looking to expand their product range in the aquarium segment. Thanks to high-quality ingredients, a comprehensive approach to nutrition and the recognizable Tropical brand, this new line helps build customer trust and effectively meet the needs of shrimp hobbyists and breeders.

Tropical invites PETS International readers to add Shrimp-UP! foods to their product lineup and take advantage of the potential of this new product. ◆

Tropical Tadeusz Ogrodnik
Tropical.pl

The cat's pajamas?

Changing attitudes and demographics, combined with the power of social media, are opening up fresh opportunities for non-dog fashion.

Adam England
Contributor
PETS International

Dogs continue to dominate the pet apparel market, but brands are gradually moving beyond their traditional focus to cats and other companion animals.

Reimagining pet fashion

Younger owners are reshaping what pet clothing represents, pushing demand beyond practical products towards fashion-led and personalized options, with figures beginning to reflect this new reality.

For a long time, pet apparel was seen as the preserve of dogs, with sweaters, coats and seasonal outfits forming a small but growing section of the pet care market. However, owners of cats and even other types of animals are now helping to redefine what pet fashion can be.

According to Rebecca Watters, Wellness Insights Director at Mintel, it is still the case that cat owners buy clothing for their pets less often than dog owners (18% vs 33%). However, the gap narrows significantly for accessories (22% vs 27%) and footwear (12% vs 14%).

Pet apparel growth in Asia

In Asian markets, the pet clothing market is growing amid shifts towards smaller households, with more people opting for owning pets rather than having children. Likewise, disposable incomes are rising across Asia, and people are spending more on pet fashion and accessories as a result.

Gloria Gan, China Insights Senior Analyst at Mintel, notes that Gen Z pet owners in particular are increasingly bringing their pets into social settings, with owners treating them as an extension of their own identities and styles. She also highlights pet fashion weeks that feature cats and exotic pets as well as dogs.

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“Pet fashion in China is therefore no longer described as niche,” Gan explains. She adds that pet clothing in the country is becoming more trend segmented. Retro and vintage influences from Korean fashion are shaping the category, echoing its human counterpart.

A form of self-expression

For brands, the appeal of expanding outside ranges for dogs isn’t just about reaching new owner segments. It’s also about tapping into a less mature category where purchasing habits and consumer expectations are still being formed.

For instance, while pet clothing has traditionally been associated with utility and function – with products such as coats that keep animals warm and dry – analysts are increasingly seeing pet apparel becoming a form of self-expression for owners. “A pet’s wardrobe is becoming a direct extension of the pet parent’s personal aesthetic,” comments a Euromonitor analyst.

Matching sports outfits

This evolution has already prompted a response from some premium global brands, with the likes of Gucci offering designer pet apparel as part of a broader fashion ecosystem. Meanwhile, coordinated outfits and ‘twinning’ trends have become popular on social media platforms, with owners and pets sporting matching clothes and accessories. This is pushing pet fashion even further into the mainstream.

In May 2025, for example, global sportswear brand Adidas introduced its first-ever pet range for dogs and cats, featuring the company’s classic logo and three stripes branding. Initially launched exclusively for the Chinese market, the collection was also released in Japan in April 2026. The range was then expanded to national football team jerseys to tie in with the summer’s FIFA World Cup tournament.

Despite growing interest in fashion-led non-dog apparel, retailers remain unconvinced that it deserves a place on the shelf. Fressnapf, Europe’s largest pet

Disposable incomes are rising across Asia, and people are spending more on pet clothing and accessories as a result.

product retailer, tells PETS International it has made an active choice not to offer feline apparel, neither online nor in physical stores. “We do this out of firm conviction, as we clearly prioritize animal welfare in line with our mission,” the company says.

“When it comes to clothing, we always focus on functionality. We never focus solely on fashion or trends, even though we’re aware that this is a strong trend among many customers – and thus among many competitors as well,” adds a Fressnapf spokesperson.

The importance of online channels

One challenge for brands entering the non-dog apparel space may therefore lie in proving that these products aren’t novelty purchases but can generate repeat demand for retailers. In the meantime, however, online channels are becoming increasingly important. According to Antons Sapriko, founder of Latvian e-commerce strategy agency scandiweb, platforms including TikTok Shop and the Chinese e-commerce and social networking site Xiaohongshu matter more than brands realize.

While pet content has always been popular on platforms such as TikTok, the path from discovering a product to purchasing it has shortened. “A viewer can go from watching a video to completing a checkout without leaving the app,” he points out.

Brands that combine emotional appeal with practicality – such as better fit, clearer sizing and products that marry functionality and fashion – are likely to emerge as the winners.

One size doesn't fit all

For apparel to be practical and functional, sizing is the main issue for pet owners. "It's genuinely hard to crack. There is no standardization across breeds, let alone species, so a size chart that works for one dog will not work for another," says Sapriko. "High return rates and low repeat purchases in this category almost always trace back to fit uncertainty."

Another challenge facing suppliers of non-dog apparel lies, therefore, not in driving consumer demand, but in reducing the unknowns that come with it. "Cat owners aren't confident that their pet will use what they buy," says Cosima Pole, founder and Creative Director at British specialist Creature Clothes. "When they do buy something and discover that their cat loves and uses it, they keep coming back to us for more."

Brands that are investing in sizing tools, measurement guides and AI recommendations may well begin to see higher conversion rates and fewer returns. "Fit and sizing tools powered by AI will stop being a nice-to-have and become table stakes," Sapriko states. He adds that non-dog apparel and social commerce are likely to become even more important as younger pet owners continue to drive category growth.

Balancing the emotional with the practical

As the market matures, the brands that combine emotional appeal with practical solutions – such as better fit, clearer sizing and products that marry functionality and fashion – are likely to emerge as the winners.

At present, non-dog apparel remains a smaller category, but brands willing to invest in securing trust and addressing the sizing issues faced by owners may find themselves writing the rules for a category that's still finding its feet. ◆

Alberto Álvarez Ayuso, CEO, Grupo IskayPet

"We are transforming our stores into distribution points for the entire network"

The Spanish pet retailer is targeting services with the aim of achieving more than 10% of its revenue via veterinary care, grooming, insurance and subscription models by 2030.

David Palacios Rubio
Editor-in-Chief
GlobalPETS

Operating Kiwoko and Tiendanimal, Grupo IskayPet is leveraging two complementary brands to address different customer needs while building a broader pet care ecosystem across Spain and Portugal.

Today, the company operates 334 stores, complemented by 56 veterinary clinics — Kivet for Kiwoko and Clinicanimal for Tiendanimal – as well as 156 grooming salons across both brands. The retailer is transforming its locations into distribution hubs, expanding urban formats and preparing subscription and insurance models to increase its role beyond product retail.

Grupo IskayPet CEO Alberto Álvarez Ayuso shares with PETS International how the company is strengthening its position in the Iberian pet care market through its store expansion strategy, including 25 new openings this year, omnichannel capabilities, private label growth and new service offerings.

Grupo IskayPet operates two retail banners. How do you differentiate their value propositions and ensure they complement each other?

I would say our strength lies in offering pet owners two complementary brands, each with a distinct value proposition. We aim to make each brand unique while ensuring they complement each other within our ecosystem.

Kiwoko currently operates 202 stores across the Iberian Peninsula, while Tiendanimal has 132 locations. We manage both brands in a way that allows us to serve different customer needs. If customers are looking for convenience and speed, Tiendanimal is usually the stronger proposition.

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If they are looking for a more experiential environment, personalized advice and specialist support, Kiwoko becomes the preferred option.

Portugal represents around 15% of Grupo IskayPet's sales. How do you see the market evolving and what are your ambitions there?
We are very pleased with the evolution of the Portuguese market. Recently, we presented our five-year strategic plan for Portugal with the ambition of becoming market leaders.

There, we are following the same approach as in Spain, maintaining two differentiated brands with complementary value propositions, supported by our veterinary clinics and grooming salons. We are very satisfied with the progress: every year sales are meeting or exceeding our expectations, and we are convinced that our strategy is being very well received by Portuguese customers.

What differences do you see between pet owners in Portugal and Spain?
There are some differences, although there are also many similarities. Portuguese consumers tend to be somewhat more promotion-driven, but at the same time we are seeing the same broader trend as in Spain: the premiumization of the pet sector.

Pet owners are increasingly looking for specific solutions adapted to their animals' needs and life stages. In Portugal, the proportion of households with pets is slightly higher than in Spain, and cats also represent a larger share of the pet population. We believe there is still significant room for further premiumization in Portugal.

Which categories are currently showing the strongest growth?
One of the biggest trends we are seeing in both Spain and Portugal is the shift from basic products towards higher-value solutions. Consumers are increasingly looking for more personalized approaches to animal care, adapted to their pets' specific needs, life stages and conditions.

Pet owners are investing more in preventive veterinary care, animal welfare, specialized nutrition, and services and experiences that improve the overall wellbeing of their animals. The focus is no longer only on feeding pets, but on supporting them throughout their entire lives with a combination of products and services.

"Pet owners are investing more in preventive veterinary care, animal welfare, specialized nutrition, and services and experiences that improve overall wellbeing."

Other important trends include the growing penetration of cats, especially in urban areas; the increase in smaller dog breeds and demand for products adapted to them; the growth of frozen food; and rising interest in supplements.

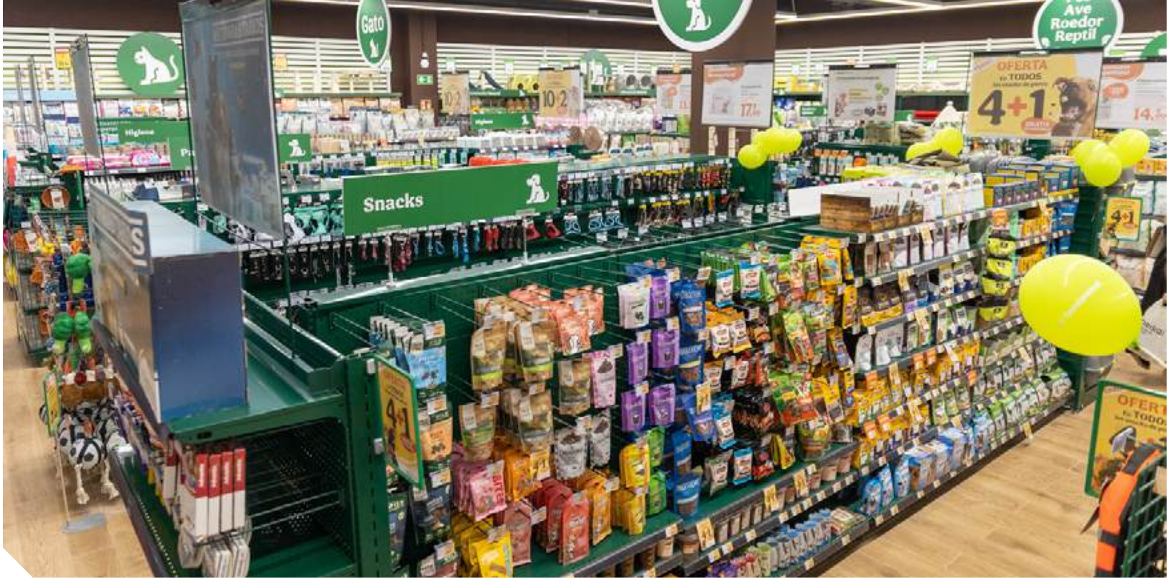
This also reflects a wider evolution in pet care habits: just as people are placing greater emphasis on supplements and wellness products to support their own health, they are increasingly applying the same focus on prevention and wellbeing to companion animals.

Could you explain the customer journey?
There are several possible journeys. A customer may start by browsing products online, place an order and choose to collect it in store to avoid waiting for delivery. Once they visit the store, they may also take their dog to the grooming salon or access another service. Later, if they realize they need something else, they can simply use our app and place another order.

Our objective is to ensure that, regardless of the channel or interaction point, customers always experience the same level of excellence. The customer belongs to the brand, not to the channel. Our role is to make sure every interaction improves the overall customer experience.

What is your approach to q-commerce?
Our priority is to understand and respond to customer needs. Some customers are happy with delivery within a few days, which we cover through our standard logistics model. Others need faster solutions.

Our main tool for speed is click and collect, allowing customers to pick up their orders in store within two hours. We also work with partners such as Glovo and Uber to provide deliveries in around 15 minutes in certain proximity areas.



In summary, we aim to offer different solutions depending on the customer's needs: immediate delivery through q-commerce, collection within two hours through click and collect or standard next-day delivery.

How is your logistics model organized to support these different delivery options?

We operate a warehouse near Madrid and, since June 2025, we also have a 10,000sq m logistics center in Azambuja, Portugal, which serves our Portuguese stores. Currently, click and collect orders are fulfilled directly from stores when the product is available there. If the product is not available in store, our warehouses supply the stores.

Looking ahead, we are developing a model where each of our nearly 350 locations across the Iberian Peninsula can also act as a distribution point. This will allow customers to access a much broader product range. For example, a customer in A Coruña [northern Spain] could order a product online that is only available in a store in Málaga [southern Spain], and we would be able to fulfill that order directly from the Málaga store.

What has driven this decision to transform stores into distribution points?

We see this as an opportunity rather than a limitation. By connecting our entire store network, we can significantly expand the product range available to customers. Instead of being restricted by the assortment of their nearest store, customers will have access to products available across our entire network.

Are there categories in which you are seeing weaker performance compared with previous years?

The dog category is not declining, but it is more stable compared with other areas. The strongest growth is coming from categories such as cat products, wet food, specialized nutrition, veterinary diets, health and hygiene.

Beyond products, we are also very pleased with the evolution of our services, particularly health plans. We are also preparing to enter the insurance segment, with the ambition that services could represent more than 10% of our total revenues by 2030. Today, we are still at an early stage, with services representing around 3% to 4% of total revenues.

Insurance penetration among pets remains relatively low in Spain. What role do retailers have in helping develop this market?

I believe retailers have a responsibility to respond to all the needs of pet owners. In some cases, insurance products for companion animals are becoming increasingly relevant, and our role is to make these solutions available to customers.

We want to offer differentiated insurance products that bring additional value to the market. We also see strong potential in subscription models, which we plan to launch next year, allowing customers to make recurring payments not only for products but also for services. Our ambition is to eventually reach around 200,000 insurance policies.

Recurring payments are already well established in markets such as the US and Canada. Do you see potential for subscription models in Spain?

Yes, I am convinced they will gain traction. My experience in other sectors shows that customers value this type of convenience.

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"Our commitment to private labels is very clear: we see them as a key differentiating factor and we will continue expanding our portfolio."

Not every customer will choose recurring payments, but there is a significant opportunity among those who regularly purchase the same products. It saves time, avoids having to remember orders and ensures products arrive when needed.

It also fits well with our broader ecosystem approach, where we accompany pet owners throughout the entire life of their animals. Customers will be able to add or remove products and services according to their needs and their pet's life stage, making the subscription model flexible and personalized.

Loyalty programs are becoming increasingly important across retail. What are the latest developments in this area and how is your approach evolving?

We have always had loyalty programs, but our vision of loyalty is evolving. Traditionally, especially in retail, loyalty was mainly based on products, prices and discounts. Today, we see loyalty in a broader way: it is about personalization and accompaniment.

Our goal is to use data to better understand both the pet and the owner, allowing us to offer more tailored solutions. It is no longer only about encouraging customers to buy more through discounts, but about accompanying them throughout the entire life cycle of the animal and responding to their specific needs.

Private label has become increasingly important across the pet industry. What role do own brands play at Grupo IskayPet, and how is this category performing?

Our own brands represent more than 40% of total sales, and some of them are among the bestselling brands in the market. Our commitment to own brands is therefore very clear: we see them as a key differentiating factor and we will continue expanding our portfolio.

At the same time, we are evolving these brands to respond to changing consumer expectations. This means developing more specialized solutions, including specific nutrition and veterinary diets. The market is demanding greater personalization, and our own brands need to evolve accordingly.

Regarding store expansion, many retailers are exploring different formats, from smaller city-center stores to larger outlets offering a broader range of services.

What is Grupo IskayPet's approach, and are there differences between Spain and Portugal or between banners?

One of the concepts we have validated is the urban store model. Speaking specifically about Spain, our plan over the next three years is to open at least 15 urban stores of around 300sq m, with an assortment adapted to the needs of urban customers.

We see a clear opportunity here because some of our existing urban stores, both in Spain and Portugal, have demonstrated strong performance. Based on this experience, we have developed a specific approach in terms of layout, assortment and store size to respond to the needs of customers, particularly in city centers.

Urban stores often operate with a slightly higher price point due to their location and convenience. Have you considered a different pricing strategy for these formats?

Our pricing policy in urban stores will not change significantly. The main difference is that these stores will be less focused on promotional activity. We have seen that urban customers are often looking for convenience, immediacy and speed rather than promotions. Therefore, promotional activity will be lower compared with other types of stores.

What are your expectations for e-commerce growth? Will Grupo IskayPet continue focusing primarily on store expansion or will online become a stronger priority?

Our objective is not to prioritize one channel over another. What we want is to offer excellence across every customer touchpoint, whether that is a store, online, telephone customer service or WhatsApp.

The market will determine the balance between online and offline, but our role is to ensure that every interaction delivers a strong

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"The strongest growth is coming from categories such as cat products, wet food, specialized nutrition, veterinary diets, health and hygiene."

experience. In e-commerce, one of our main challenges is continuing to improve delivery capabilities and offer customers the convenience they expect.

The reality is that customers are increasingly omnichannel. We do not see customers as belonging exclusively to one channel. In fact, omnichannel customers spend twice as much, purchase 2.5 times more frequently and have a retention rate 17 percentage points higher than single-channel customers.

That is why our strategy is to be excellent across every contact point and ensure that Grupo IskayPet, through Kiwoko and Tiendanimal, remains the first choice for both products and services.

Competition from international e-commerce players, particularly Asian platforms offering accessories at very low prices, is increasing. Are you seeing an impact from this trend, and how are you responding?

If I said there was no impact, I would not be being honest. However, this is not the space where we want to compete. We cannot and do not want to compete solely on price with these retailers.

Our focus is different: we want to accompany pet owners throughout the entire life of their animals. That means offering not only accessories, but also specialized nutrition, veterinary services and a complete ecosystem of care.

A customer who is only looking for the cheapest accessory may find a better price elsewhere, and that is understandable. But that is not our target customer. We aim to offer a more complete solution.

Have you adapted your accessories portfolio to also appeal to consumers looking for more affordable options?

Yes, we have a dedicated own-brand accessories team that identifies customer needs and develops products accordingly.

However, our approach always starts with quality. First, we identify a customer need, then we establish the required quality criteria and finally we develop the product at the most competitive price possible. This is the same philosophy we apply to our own food brands. Price is important, but quality and the ability to solve a real need for the pet owner come first.

We also continue investing in innovation to ensure that our assortment remains aligned with market trends and customer expectations. ◆

Grupo IskayPet CCO Aly Meyers will speak at the GlobalPETS Forum 2027. Join us in January in Lisbon!

Country report: Spain

Mature owners are shaping the next era of pet care

A new generation of engaged pet parents is refashioning consumption habits, raising expectations and creating new opportunities across food, retail and services.

Ignasi Solana Vinyoles
Secretary General
Spanish Pet Industry Association (AEDPAC)

Spain's animal lovers are evolving, and so is the market around them. More households have pets, adoption is becoming the dominant route into ownership and consumers are taking a more considered approach to food, products and services.

More households with pets

At the same time, younger pet parents are turning to social media and other digital sources for advice, opening the door for pet players to engage with consumers in novel ways.

Pets remain popular in Spain, with more than half of households having at least one companion animal. According to the 3rd Pet Parents Barometer in Spain 2026, presented at Iberzoo Propet 2026 in Madrid, the share has reached 54%, up two percentage points compared with the previous year.

The research, conducted by the Spanish Association of Trade and Industry for the Companion Animal Sector (AEDPAC), was based on 713 online interviews with a representative sample of Spanish owners. The survey covered 879 pets, including 523 dogs and 356 cats.

Increasing diversity = new opportunities

Besides the quantitative growth, the market is also becoming more diverse. The number of mixed-pet households (those with both dogs and cats) has grown significantly, reaching 27.3%. Meanwhile, the share of Spanish households keeping reptiles and turtles increased from 1.9% to 3% in just one year. A similar upward trend was observed among fish owners, rising from 4.9% to 6%.

In comparison, cat-only households remain stable at 24.5% and dog-only households have declined to 48.2%, although they remain the largest group. For the industry, this means more segmentation, increasingly complex needs and new opportunities for cross-category consumption and specialized communication.

Making the choice to adopt

Adoption is now the main way pets enter Spanish households. Direct purchases are declining, particularly for dogs, where numbers have fallen by nearly 10 percentage points compared to 2025. ▶ SEE NEXT PAGE

Nowadays, seven in 10 dogs are adopted – either from shelters, private individuals or after being found – while six in 10 cats come from non-commercial sources.

Older pet parents are more selective

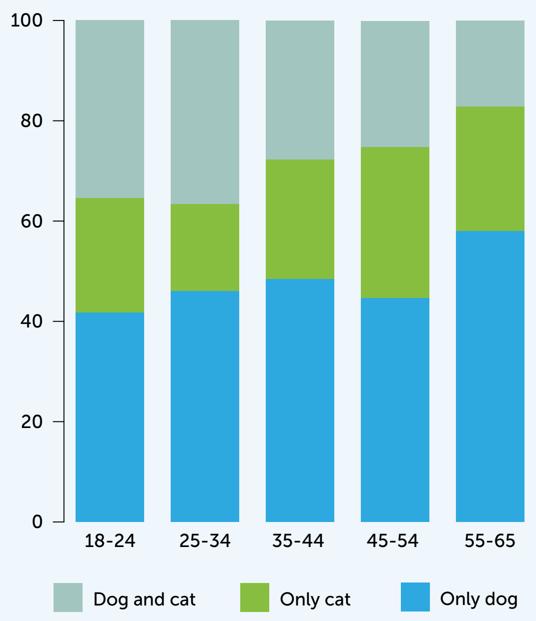
Another interesting finding from the survey is that pet parenting is maturing. The share of first-time pet parents has declined slightly to 23.6%. This suggests that many households are not just adopting or buying a pet once but are repeating the experience and integrating companion animals into their long-term way of life.

This is supported by the fact that the emotional bond remains very strong, with around eight in 10 respondents considering their pet a member of the family. Furthermore, four in 10 owners identify with the term 'pet parent'.

This maturing demographic has direct implications for brands and manufacturers. A more experienced pet parent is often a more selective consumer: they compare, ask, read, listen to professional advice and are more aware of the impact of products on health, behavior and wellbeing. The value proposition must therefore go beyond functionality or price to include trust, expertise, safety and transparency.

Pet distribution in Spanish households

(by age group, in %)



Source: 3rd Pet Parents Barometer in Spain 2026, AEDPAC

Food as the cornerstone of spending

Food remains the foundation of the Spanish pet care market, accounting for 38.8% of the total monthly pet budget. This category remains highly resilient because it is perceived as essential care.

The average monthly spending on pet food is around €58 ($67), although over half of owners (51.1%) spend a maximum of €45 ($52) per month. Dog and cat owners in the 35-44 age category have the highest monthly food costs, spending an average of €60 ($69).

Balancing value and brand trust

However, the barometer shows that Spanish pet parents are not driven only by cost; they also value quality, health and expert guidance. Looking at the criteria on a scale of one to 10, food quality is the most important (8.6), followed by the pet's taste or preference (8.2) and veterinary recommendations (8.1). Price and promotions remain relevant, but they do not dominate the purchasing decision.

The data also shows that known brands continue to lead over retailers' own labels, with 65.9% of purchases corresponding to manufacturer brands, compared with 25.6% for private label and 8.5% for custom diets.

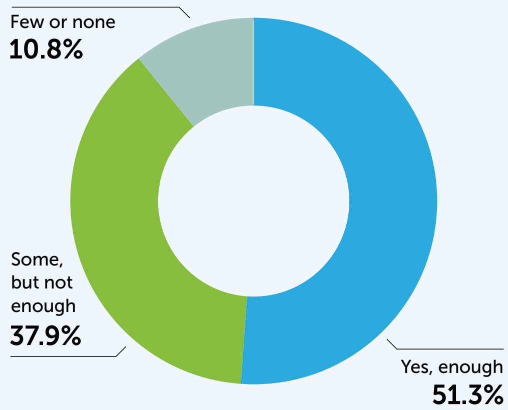
Moreover, among those who do not buy private label products, 64.3% of respondents say they would not switch to a lower-priced private label option even if they had to reduce household grocery expenses.

AEDPAC also found that more than half of Spanish pet owners (52.7%) combine brands when purchasing pet food, up from 48.9% in 2025. Those attached to specific brands decreased by more than five points, from 43.6% in 2025 to 38.2% this year.

Trend to watch: homemade pet food

Cooking for pets has entered Spanish households and, although not yet leading, it could be a trend to watch. On average, 2.1 pet meals in every 10 are currently

'Are there enough designated pet areas in Spain?'



Source: 1st Pet-Friendly Barometer in Spain 2026, AEDPAC

home cooked, with 4.8% cooking frequently (six to nine times in 10) and 2.9% always preparing homemade food for their companion animals. On the other hand, 36.4% indicate that they never cook for their pet.

The results also vary by type of pet. Almost 10% of Spanish dog owners say they cook for their pets frequently or always, compared with 6% of cat owners. More than four in 10 (43.9%) cat owners never prepare homemade food for their pets, compared with 28.8% of dog owners.

The starkest difference is seen across age groups. Among 18-24-year-old pet owners, 14.7% cook for their pets frequently or always, compared with 6.9% of those aged 55-65.

In-store purchases hold firm against online

Despite the digital transition, only 1% of Spanish pet owners purchase all their pet food online. An average of 14.1% shop exclusively in-store, while the remaining 84.9% use both channels, but buy more in-store than online.

Supermarkets and hypermarkets dominate in-store purchases, accounting for 50.7%, followed by specialized chain stores at 27.6%. Online purchases, in contrast, are more evenly

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distributed among specialist platforms (26.2%), supermarkets and hypermarkets (25.7%) and online specialized chains (24.1%).

Pet nutrition: shifting sources of influence

Veterinary clinics account for 22% of in-store purchases, closely followed by pet specialty retailers (20.6%). These channels are also regarded as the main source of information on pet nutrition, especially among more mature pet parents. For example, 72.6% of owners in the 55-65 age range cite veterinarians as their main source of influence.

However, this predominance shows signs of shifting. While veterinarians or animal health professionals score an across-the-board average of 56.8%, this figure is only 38.9% in the 18-24 age range. Especially among younger consumers, it seems that social media (26.4%), podcasts (15.3%) and online training platforms (13.2%) are gaining in importance.

How welcome are pets?

One interesting research question is whether Spain has a pet-friendly culture. According to AEDPAC's 1st Pet-Friendly Barometer in Spain 2026, nearly half of pet parents in the country believe there are not enough pet-friendly spaces.

The other half (51.3%) believe that there are enough pet-friendly environments, nearly nine points more than in the 2025 report.

Travel and accommodation are particularly relevant assessment criteria. Nearly four in 10 pet parents always look for pet-friendly options when planning holidays, rising to more than half among those aged 25-35.

Perhaps unsurprisingly, this average percentage is higher among dog owners (42.9%) than cat owners (33.9%), with 37.6% of cat owners saying they never travel with their pet (compared to 23.4% of dog owners).

In terms of the demographics, owners in the 18-24 and 25-34 age ranges are the most likely to look for pet-friendly accommodation (43.8% and 54.9%, respectively). This opens up interesting opportunities for hotels and other types of accommodation to lead the pet-friendly revolution. These opportunities can also be extended to transport and perhaps even retail brands looking to become more strongly associated with pet-friendly positioning.

The next frontier

The evolution of Spain's pet market is creating opportunities far beyond food and traditional pet retail.

The challenge for the industry will be to keep pace with these developments: serving more diverse households, communicating with successive generations of pet parents and responding to demand for pet-friendly experiences. ◆

'Where do you usually buy food online for your pet or pets?'

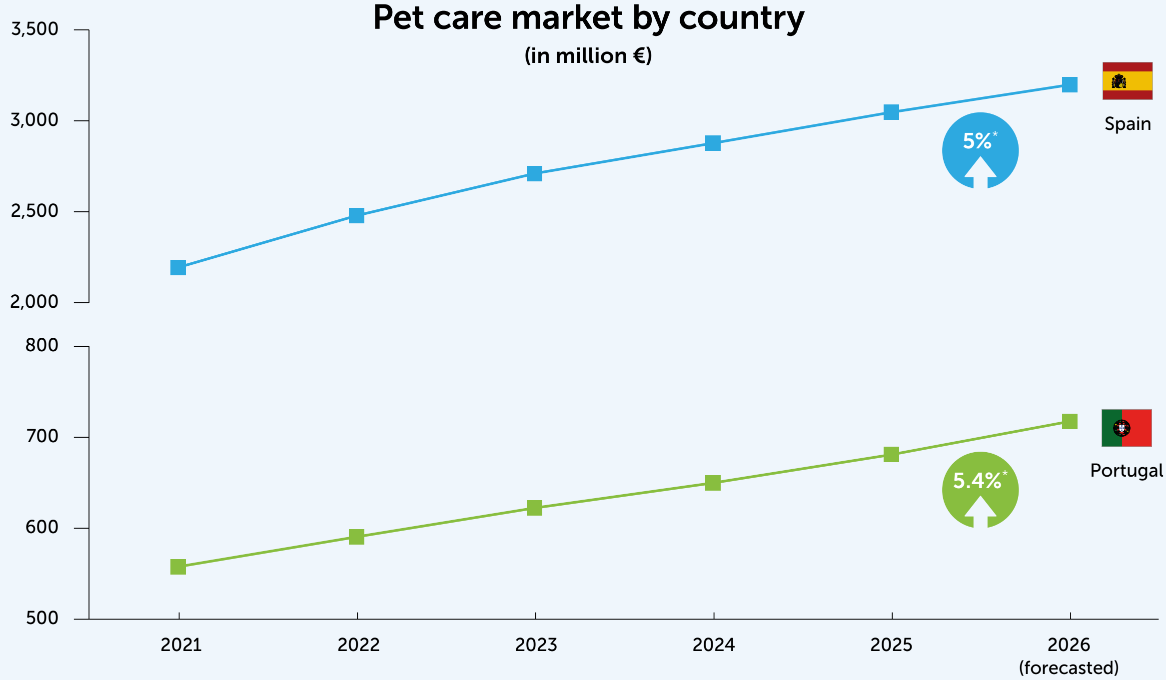
1	Specialized online platforms	26.2%
2	Online supermarket or hypermarket	25.7%
3	Online specialized chain store	24.1%

Source: 3rd Pet Parents Barometer in Spain 2026, AEDPAC

Pet industry snapshot: Iberian Peninsula

Pet care market by country

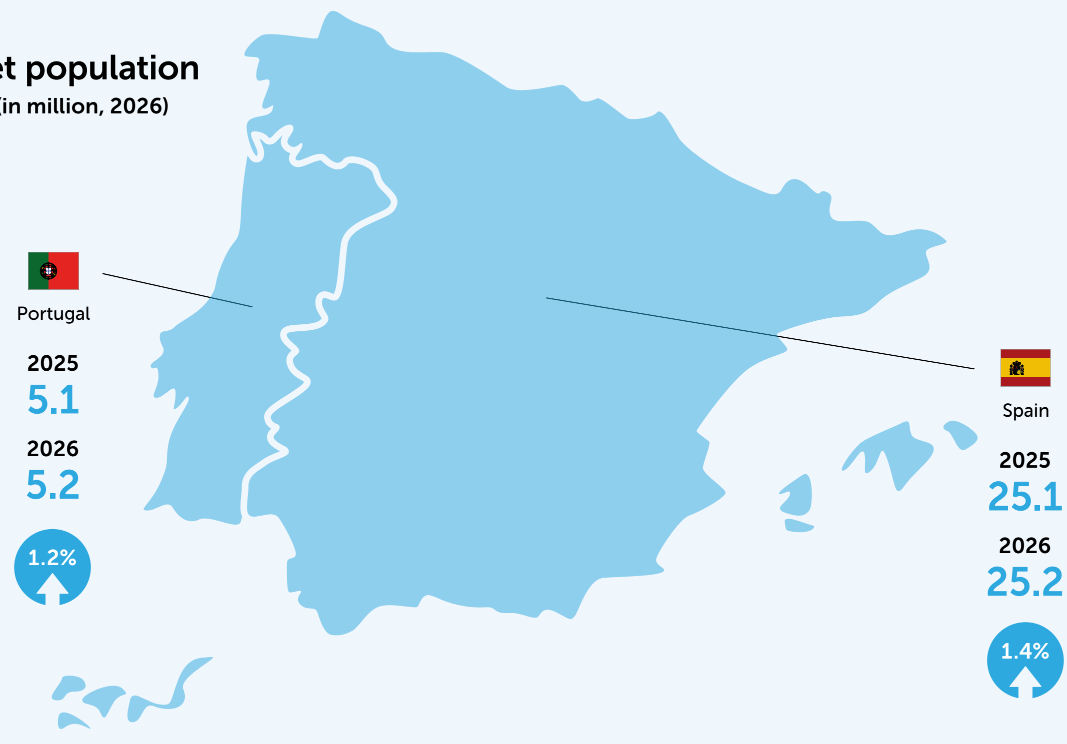
(in million €)



*% increase between 2025 and 2026 (forecasted)

Pet population

(in million, 2026)



Source: Euromonitor International

Country report: Portugal

Competition intensifies as the market builds

The expansion of specialized retail beyond major centers, as well as investment in local production boosted by public funding, are key to understanding the driving forces of the Portuguese pet segment.

Thaís Matos
Senior Business Reporter
GlobalPETS

The pet care market in Portugal is forecast to be worth €717.4 million ($829.5M) in 2026, representing a 5.4% advance on the previous year's figure of €680.9 million ($787.3M). At the same time the total pet population is expected to rise at a rate of 1.2% to around 5.2 million, according to Euromonitor figures.

M&A, private label and e-commerce

A series of launches, expansions and partnerships resulting from multi-million-euro investments in the sector are helping the industry to consolidate its domestic growth, while simultaneously increase exports both inside and outside the EU.

There have been some significant movements in the Portuguese pet business arena recently, including the acquisition of pet specialty retailer ZU by Musti Group, both part of Sonae, in December 2025. In addition, the brand has launched its own e-commerce platform and entered the private label business.

"We detached our e-commerce from the Continente [the supermarket chain] infrastructure and relaunched the website on a new platform. We expect traditional e-commerce to weigh about 5% at the end of the year and q-commerce to weigh another 5%, putting the total share at roughly 10%," ZU's CEO Tobias Azevedo tells PETS International.

Until November 2025, ZU didn't have its own labels. But between the end of that year and the beginning of 2026, the retailer launched two brands, Pescot and Moggy, offering dry dog food and cat litter respectively.

"The Musti acquisition gave us instant access to a very complete portfolio of own brands across all categories. We have been selectively introducing these throughout ZU stores since the beginning of the year," explains Azevedo. Currently, the overall inclusion rate is around 4%, with some stores close to double digits in private labels on the assortment.

The company's goal is to reach double digits across all stores by the end of 2026, especially with wet food under the Pescot label, and a grain-free variant of Musti's Purenatural brand recently launched in the Nordics.

Opportunities in a crowded market

As the Portuguese pet care market becomes "more crowded", according to ZU's CEO, the company sees the greatest whitespace opportunities in southern Portugal, as well as in the urban areas of Porto and Lisbon.

At the end of July, the Portuguese pet retailer acquired nine stores from competitor PetOutlet, a chain operating 30 pet specialty stores across mainland Portugal. The new locations are in the Porto area and in the southern region of Faro, bringing ZU's total store count to 84.

"There is an extra important fit between the PetOutlet and ZU stores given some similarity between offer and location, which are mostly in shopping centers or galleries with a Continente store," Azevedo explains, stating that this proximity drives the use of the loyalty scheme Continente Card.

Over the next six months, the stores will be remodeled to reflect ZU's design and portfolio of exclusive and market brands. By the end of 2026, the chain plans to add six more stores, totaling 25 new units this year. This follows on from 10 other store expansions carried out by ZU since the beginning of the year, highlighting the retailer's dual growth strategy, combining organic expansion with acquisitions.

Further developments

Another chain expanding in the country is the Spanish-based Kiwoko, which will open two more stores, one in the south and the other in the central region. The chain arrived in Portugal in 2016; 10 years later, it has 42 stores open.

"Our expansion strategy focuses not only on large urban centers, but also on cities where we feel we can make a difference. The upcoming opening in Beja [southern Portugal] reflects precisely this vision," explains Cristina Soares, Country Manager, Portugal at Kiwoko.

Food producer petMaxi is also growing, but in efficiency and capacity. The company is finalizing an investment of approximately €12 million ($14M) in warehouse capacity and logistics automation using AI.

Furthermore, the construction of a new factory, representing an investment of €30 million ($34M), is scheduled for completion in 2027, according to Head of Marketing and Communication at petMaxi, Helena Gomes. After the whole project is concluded, the company expects a 75% increase in production capacity.

The expansion will be coupled with investment in existing stores to improve omnichannel capabilities, including click-and-collect options.

Kiwoko's Soares says that the company is noticing a significant growth in specialized pet food, targeting the specific needs of puppies, seniors and sterilized animals, as well as products with health claims. This year, the retailer will invest in increasing its offering of these goods. Kiwoko also highlights positive growth in hygiene-related lines, toys, accessories and enrichment products.

"At the same time, we will continue to invest in our grooming services through Kiwoko Beauty Centers and in veterinary care through Kivet clinics to offer an increasingly comprehensive and integrated response," Soares adds.

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WeBiotic
WeConfort
WeJoint
WeVit
WeDerm
WeJoint plus
WePatiCare
WeGastro
WeCysto
WeNefro
WeCalm
WeMalt

Specialized demand

This shift in consumer preference is not limited to premium or super-premium categories. Gomes notes there is a growing demand for transparency, ingredient origin and nutritional composition information in the economic segment as well.

Partnerships to boost discovery

The pet presence is also expanding to less conventional outlets. From March, pet food has been available through the surplus produce marketplace Too Good To Go for the first time in the country. The app has partnered with Tibi – Pets for Life, a pet shop chain with eight stores in the Algarve.

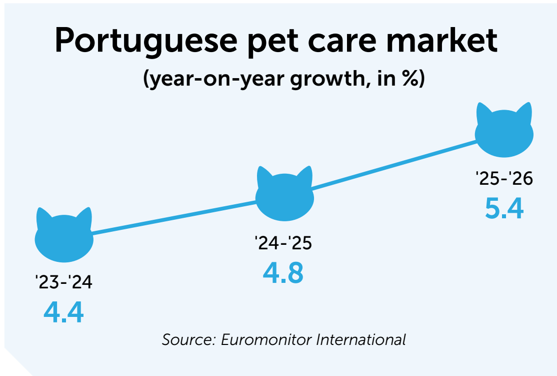
As the pet market grows, “there is also a growing search for solutions that combine quality, sustainability and affordable prices”, Soraia Fernandes, Business Director at Tibi, says. While the initiative targets customers who are environmentally engaged or trying to contend with financial hardship, it’s also an investment in product discovery, she explains. The offer in the app includes kibble, wet food and snacks in the form of ‘surprise’ bags, with the content varying depending on availability.

Pet food production

Member companies of the Portuguese Association of Compound Animal Feed Manufacturers (IACA) reported that 197,500 tons of pet food were produced in 2025, a 5.5% increase compared to the previous year, according to Secretary General Jaime Piçarra.

Piçarra notes that national production accounts for between 35 and 40% of the market, with the possibility that it will exceed 50% in the short term, but says: “We face challenges and constraints, starting with the VAT on pet food, at 23%, which compromises export capacity and creates competitive disadvantages with direct competitors such as Spain.”

The association advocates for the harmonization of the VAT on pet food with that of feed for livestock production, currently at 6%, or an intermediate rate of 13%. Data from the Eurostat shows total exports of dog and cat food increased by 4.1% year-over-year (YoY) in 2025, to €271.2 million ($308.4M). However, in terms of volume, the growth was only 0.9%, representing 174.5 million kg.



Investing in manufacturing

If ZU anticipates a market with more players over time, 2026’s developments show the extent of this increasing trend across different parts of the industry.

For instance, pet food manufacturer Apura inaugurated a cat and dog food factory in June in the city of Barcelos, in the northwest of Portugal. With an investment of €10 million ($11.3M) in construction and machinery, the facility has a built area of 1,400sq m, with the potential to reach 6,000sq m. The investment was supported by the local authority.

Public funding will also facilitate the installation of another factory in the country, as the Belgian company United Petfood will receive a contractual incentive of €9.8 million ($11.1M) from the Agency for Investment and Foreign Trade of Portugal in an estimated investment of €32.9 million ($37.4M) for construction.

The facility will be located in Rio Maior, between Lisbon and Coimbra, and will focus on the production of dry pet food. The incentive stems from a government effort to increase productive innovation and includes five other projects outside the pet sector.

A market on the move

Portuguese pet owners continue to rise in numbers and, alongside their European counterparts, are becoming more interested in specialized and targeted products. There remains the potential for both local manufacturers and pet store chains to capitalize, and for the wider European market to take an increasing interest, as long as businesses are quick to adapt to a changing retail landscape. ◆

Tobias Azevedo, CEO, ZU

“We should reach at least 125 stores by 2030, as there is demand”

Following its acquisition by Musti, the Portuguese pet retailer is accelerating its expansion strategy, with larger stores in the pipeline offering a deeper range of accessories and services.

David Palacios Rubio
Editor-in-Chief
GlobalPETS

Thaís Matos
Senior Business Reporter
GlobalPETS

Owned by Portuguese retail group Sonae, pet specialist ZU and supermarket chain Continente are taking a complementary approach to the pet category. While Continente provides scale, convenience and broad access to pet products through the grocery channel, ZU brings specialized expertise, premium assortments, and veterinary and grooming services.

Since joining Nordic pet care group Musti last December, ZU has accelerated its expansion plans while gaining access to new products, sourcing capabilities and industry know-how.

ZU CEO Tobias Azevedo shares with PETS International how the combination of Sonae’s retail ecosystem, Continente’s reach, ZU’s specialization and Musti’s expertise is supporting the company’s growth and strengthening its position in Portugal’s pet care market.

What role do Continente and ZU play within the Portuguese pet industry? What is each company’s market share within the category?
Continente and ZU play complementary roles in guaranteeing a complete value proposal for pet owners. ZU’s value proposition expands on what Continente and the grocery channel as a whole can offer with more specialized products, including a large assortment of grooming and veterinary services.

In the grocery market, pet care at Continente is a destination category, characterized by high purchase frequency and strong penetration in the customer's purchases. In cat and dog food (including wet food and snacks), ZU's market share in the specialized market for 2025 was 22%.

How do ZU and Continente complement each other in terms of pet product offerings? Are the customer bases distinct, or is there overlap between them?

Although there are some overlaps in product ranges, as we see that the upper line of a typical grocery range and the lower line of a typical specialized store is becoming increasingly blurry, we believe that Continente and ZU complement each other more than they compete.

A clear example of this is the number of locations that have both a Continente and ZU store. And the great indicator for us is that when a new ZU store is opened in an existing Continente shopping gallery, the pet care sales of that Continente store tend to increase rather than decrease.

The relationship between the brands is reinforced by the common loyalty program Cartão Continente, which keeps customers inside the same ecosystem. The data allows us to determine that the vast majority of our consumers also shop at Continente.

Overall, those who shop at two or more Sonae banners within the same commercial gallery tend to spend more, and are more likely to engage with our loyalty program, either through coupons or rebate mechanics. In the specific case of ZU and Continente pet care, it has to do with the capacity of ZU to attract premium pet food consumers who then also shop for accessories or other items at Continente.

How many pet-related SKUs do you currently have in Continente and ZU? Within Continente, what share of the overall assortment do pet products represent?

ZU's assortment comprises around 4,500 SKUs, with own and exclusive (O&E) brands representing approximately 20% of the total range.

Continente stores offer around 2,100 SKUs, with O&E brands accounting for more than a quarter of the selection.

What are the biggest changes you have seen in Portuguese pet owners' purchasing behavior over the past two years?

At ZU we are seeing an increase in customers who buy food and pet products both online and offline, and use both veterinary and grooming services. And this is the key reason why ZU has outgrown the pet care market in Portugal in the past three years.

In fact the growth of omnichannel shopping can be observed across the overall market. Consumers are prioritizing convenience and q-commerce. Pet parents now have access to a broader range of products across the retail ecosystem, including online platforms, discount retailers, new market entrants and specialized pet channels. As a result, pressure on perceived value continues to increase.

Are there notable differences in purchasing patterns between dog and cat owners?

The most obvious one is average basket value and visit frequency. Dog customers visit less often but have a higher average basket while cat owners visit more frequently with smaller average baskets.

Additionally we see that dog customers tend to be more experimental in their purchases, often opting for trying out new products. This trend is felt to a greater extent in accessories and complementary products but extends to food to a lesser degree.

Among cat owners we see a much higher resistance to change, which is especially felt in dry food and litter categories. This makes them ideal for the online channel and auto-replenishment or subscription models. In general cat customers also over-index in premium categories compared with dog consumers.

And what about Continente's grocery channel?

The average basket of cat owners is also higher than that of dog customers. Also in grocery, premium and super-premium brands have a stronger presence in the cat category when compared with the dog category, reflecting consumers' willingness to invest in higher-quality nutrition and care.

Growth is particularly strong in wet food and complementary products, which

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are among the fastest-growing segments in terms of innovation. In addition, cat litter plays an important role as a traffic-driving category, generating frequent store visits and repeat purchases.

Within the dog category, the population is gradually shifting towards smaller breeds, which represent the fastest-growing segment. This trend is contributing to significant category growth and is closely linked to the increasing adoption of mixed feeding habits, combining dry and wet food. As a result, the dog wet food segment is experiencing strong momentum and sustained growth.

Which pet categories are growing fastest at Continente and ZU?

At ZU, the fastest-growing categories are wet cat food, dog accessories (particularly toys), and veterinary supplements (such as joint and coat health products) for both cats and dogs.

In the grocery market and in particular in Continente stores, wet food technology is currently the fastest-growing segment in the market, while complementary food is also experiencing strong growth, particularly within the cat category, where we are seeing a lot of innovation.

Are you noticing customers move away from the middle segment towards value and premium products?

At the moment we are not seeing a clear sign of this. While the premium and super-premium categories are clearly growing and represent the majority of ZU's sales, the introduction of high-quality but lower-priced O&E brands is also driving the lower-value segments of our range.

In fact, pet owners are becoming increasingly well-informed and are seeking higher-quality products; that's why premiumization continues to gain market share across the category.

However, private label is also gaining market share: as product quality and recipes continue to improve, consumers are becoming more willing to switch brands when they recognize a good-quality proposal. This evolution is helping to reduce the traditional gap between branded and private label products, particularly in mainstream segments.

What share of ZU's sales currently comes from O&E brands?

It is important to note that, until November 2025, ZU had no own brands. We started by launching two brands – Pescot for dog food and Moggy for cat litter – in late 2025 to early 2026. Currently we average about 4% across all stores with some stores already close to double digits.

What is your target for this segment?

The objective is to reach double digits overall by the end of the year and to increase from there.

How has joining Musti changed ZU's product offering, sourcing and growth strategy?

We are six months into the integration process but progress is very encouraging. I believe that at this point our customers are the clear winners as we have managed to introduce a record amount of Musti products into our stores, which have been extremely well received by our customer base. The feedback has been constant and almost always positive.

Strategically, Musti gives us access to the scale, sourcing power, brand portfolio and the know-how of one of Europe's leading pet care groups.

So far this has translated into new products in our stores but also an accelerated expansion plan for new stores in Portugal. As of today [mid-June] we have opened seven new stores and at least 13 more organic openings are planned for 2026. This is a record in the number of store openings in one year.

But not only are we opening more stores, we are opening significantly larger stores with a more complete and deep range of accessories and services. The additional scale and growth perspectives have allowed us to grow the team with key new members in all areas.

Do ZU or Continente have any planned investments to expand e-commerce capabilities in this area?

ZU has recently relaunched its website and plans to develop it over the coming years, adding subscription models and other predictive tools to maximize convenience and drive an experience with the same level of quality as online stores.

What is the strategy for physical store expansion in the near future?

Given the size of the market and its evolution, the activity of our competitors and the general trends in population dynamics we believe that we should reach at least 125 stores by 2030 and that there is demand for these.

For us at ZU we believe firmly this is the moment where the Portuguese market will consolidate, therefore we are betting heavily on expansion and planning to open circa 25 stores per year in the next three years.

> ***"Strategically, Musti gives us access to the scale, sourcing power, brand portfolio and the know-how of one of Europe's leading pet care groups."***

For future openings, will you continue to prioritize locations close to Continente stores, or are you increasingly exploring standalone and retail center locations?

Stores located adjacent to a Continente store are always a priority for us due to the multi-banner effect and the high footfall generated by Continente. However, we are also exploring larger stores where we can have a higher percentage of own brands and accessories.

The amount of large spaces located close to Continente stores is limited and has led us to explore alternatives such as retail centers. For us the sweet spot is a retail center with a Continente store present. ◆

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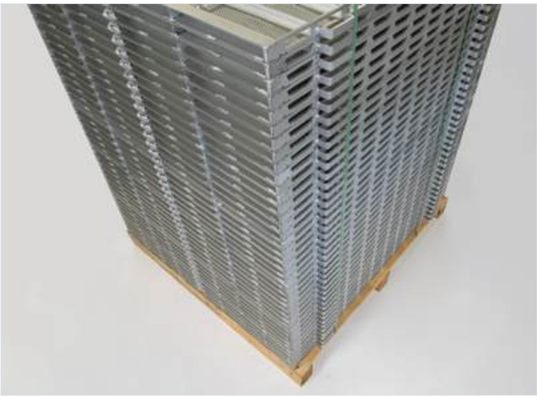

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Europe leads in latest pet food M&A cycle

A transatlantic divide is emerging in 2026 as European players pursue global expansion while North America prioritizes integration and margin protection.

Alex Masters
Managing Director, Co-Head of EMEA Consumer & Retail, Stifel Europe

The standard narrative often groups Western markets together, but a sharp divergence has become apparent. As US deals largely follow a defensive cycle, Europe's regional consolidators are active locally and across the Atlantic. For management teams and investors, the signal is clear: Europeans are pursuing industrial-scale consolidation.

The transatlantic leap

The most significant development of the first half of 2026 was the emergence of European mid-caps as acquirers in the North American market. In February, Nasta Pet Food (Holding Babin), a French family-owned leader in ultra-premium nutrition, completed the acquisition of Canada's FirstMate Pet Foods.

Supported by a €120 million ($139M) financing package, this move is not merely a geographic addition. It is a fundamental shift in industrial scale. The combined Nasta-FirstMate entity now commands a consolidated industrial capacity of 54,000 tonnes of dry pet food and 4,000 tonnes of wet pet food per year, serving over 400,000 pet families globally.

Dedicated strategy

This transaction signals that European players are no longer content with regional consolidation. They are leveraging their expertise to capture a super-premium share in the more fragmented US landscape. The transatlantic offensive is further evidenced by the United Petfood strategy.

As part of its 2026 expansion roadmap, United Petfood has a dedicated North American investment strategy, underscored by its acquisition of production facilities in Canada. The company's ability to maintain an estimated €100 million ($115M) annual M&A spend suggests that the 'private label powerhouse' model is the most resilient vehicle for global expansion in the current macroeconomic climate.

Specialization over scale

The 'big six' branded consolidators in Europe are shifting their focus from pure volume to category specialization. French company Nasta's substantial Canadian acquisition was a clear example of this.

AlphaPet Ventures in Germany continues to refine the 'digital brand platform' model. Following its acquisition of the Belgian super-premium kibble brand CPRO FOOD in April 2026, it quickly moved to acquire Tierliebhaber, the German leader in pet supplements and functional snacks. This marks AlphaPet's sixth acquisition since 2020, signaling a move into high-margin wellness categories that are less sensitive to raw material volatility.

After Chris Schulze-Melander joined Assisi Pet Care in the UK as CEO in August 2024, its acquisition intensity slowed. It has pivoted from lower-

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margin kibble to higher-margin natural treats through two acquisitions – the dog treat brands YAKERS in July 2025 and Sniffers Pet Care and its lead all-meat chew brand NAW in May 2026. The company also announced its Forthglade natural dog food deal this summer.

Premium portfolios

In a move to optimize its buy-and-build 'machine', VAFO Group in the Czech Republic underwent a major internal restructuring in January 2026. The group is now divided into three distinct units: VAFO Praha (flagship brands), VAFO Private Labels and VAFO Production. This structure allows VAFO to scale its manufacturing footprint in Western Europe, while maintaining the brand equity of its premium portfolios.

The Nutriment Company (formerly Voff), a Nordic-backed platform based in Sweden and Germany, recently completed 12 acquisitions in a relatively short period (January 2025 to August 2026). This includes two deals that were announced in the first half of 2026, maintaining its dominance in the premium raw segment – still the fastest-growing niche in the European premium tier – while also reinforcing its presence in minimally processed foods and treats.

Inspired Pet Nutrition (IPN) in the UK has taken a pause in 2026, to allow it to integrate its French acquisitions Ultra Premium Direct and dry dog food manufacturer Sopral, which it announced in the summer of 2025. The additions provide the company with European brands and DTC expertise as well as substantial premium kibble capacity.

The protein shake-up

The alternative protein sector, once the darling of venture capital, has now entered a painful 'reality check' phase. The bankruptcy and judicial liquidation of Ÿnsect in the earlier part of this year served as a watershed moment for the category.

Despite raising over €600 million ($693M), the firm's failure highlights a lack of mass customer adoption as well as the economic challenges and biosecurity issues of industrial-scale insect farming. Investor interest in this category has now shifted toward smaller, upcycled startups – like Omuu – which focus on veterinary-led functional nutrition rather than massive infrastructure.

European players are leveraging their expertise to capture a super-premium share in the more fragmented US landscape.

Power of private label

Private label has now become a lot more than just a discount-driven niche and is definitely a structural force in the European pet food sector. Data analytics firm Circana estimates its current value share at around 34% across Europe's six largest markets.

Specialist pet retailers are increasingly building 'good-better-best' own-brand architectures that span natural ingredients and science or vet-led positioning. UK giant Pets at Home, for example, offers Step Up (value), AVA (veterinary-approved) and Wainwright's (natural). Fressnapf and Maxi Zoo operate Select Gold (premium) and Real Nature (natural).

Grocers are also strengthening their premium private label ranges. However, penetration growth is showing signs of slowing – and in some markets, even declining. The two largest European groups – United Petfood and Partner in Pet Food (PPF) – have followed very different strategies over the last few years.

Buy-and-build or integration?

Backed by Waterland Private Equity, a European investment firm headquartered in the Netherlands, United Petfood is still pursuing an aggressive buy-and-build strategy. This means acquiring multiple businesses to build scale, expand geographically and strengthen its market position. An example of this is a recent investment in German wet pet food producer SmartPetPro.

Besides benefiting from its annual acquisition firepower, the company also continues to build its business through organic growth. This involves, for instance, the creation of new, greenfield capacity (wet/pouch and snacks in Poland, as well as snacks in Spain and Romania).

PPF has adopted a different course following its majority acquisition by CVC alongside existing investor Cinven in 2024. The company has stayed out of the M&A market since then, focusing on increasing integration among its pan-European network of 12 factories.

Platform mergers on their way

Looking toward 2027, the European pet M&A landscape could transition to Platform-on-Platform consolidation. Many of the private equity (PE) funds that fueled the 2020-2023 buy-and-build wave (CapVest, Axcel, Waterland, Capiton) are approaching their typical exit horizons.

The next 18 months will likely see the first major mergers between these existing platforms, as they seek the scale required for an IPO or sale to a global strategic buyer.

Future opportunities

The €1.7 billion ($2B) raised through General Mills' recent euro bond issuance could indicate the company's intention to pursue European M&A. Pet food would be a more resilient category than human food for future acquisitions. IPN, with its scope in European kibble and significant manufacturing capacity, would be a relevant target to add scale and bring GM's supply chain in Europe in-house following its 2024 acquisition of Edgar & Cooper.

The strategic takeaway is that the 'valuation premium' of pet food has normalized. Median multiples have reset to approximately 10x EBITDA, aligning the sector with high-quality consumer packaged goods assets. For owners and managers, success in 2027 will not be measured merely by deal volume, but by the ability to integrate assets and deliver synergies across European borders. ◆

Benchmarking: Europe vs Global

The European pet M&A market is operating in a different reality than the US and the broader human food sector.

US comparison

While Europe recorded 30 deals in the first quarter of 2026, the US landscape remains subdued. Major players like Post Holdings and General Mills are focused on integration (e.g. the Nutrish relaunch) and share repurchases rather than volume-chasing M&A.

Human food comparison

The broader European human food sector is characterized by large cap and mega-deals, such as Unilever's announced sale of its global food business and Danone acquiring nutrition brand Huel.

In contrast, European pet food consolidation is mid-cap focused, where deal frequency is higher relative to market size, reflecting the agility of PE-backed platforms and the pan-European consolidation among mid-sized players.

European pet food M&A: high-value growth at a reset valuation

Metric	Value	Strategic context
Core market sales	€29.4B ($34B)	Strongest sector in European CPG
Annual volume	8.6 million tonnes	Shift to higher-value wet formats
Median M&A multiple	9.9x EBITDA	Reset from peak of 16.8x
Private label share	40% (volume)/34% (value)	Highest in smaller markets such as Portugal and Hungary

Sources: European Pet Food Industry Federation (FEDIAF), Circana, Private Label Manufacturers Association (PLMA)

How will new EU rules reshape the business environment?

Updated merger guidelines and regulatory changes aim to attract investment and reduce complexity, but their practical effectiveness remains uncertain.

Thaís Matos
Senior Business Reporter
GlobalPETS

Earlier this year, the European Union introduced measures for simplification and single market integration, and reviewed merger rules that may have significant implications for industry consolidation. The revised legislation should improve the region's global competitiveness and make it more attractive for businesses.

Theories of harm and benefit

In April 2026, the European Commission (EC) published a draft of its new Merger Guidelines for public consultation, proposing to replace the existing 2004 Horizontal Merger Guidelines and 2008 Non-Horizontal Merger Guidelines. The document places greater emphasis on assessing merger harm through market power, based on criteria such as market shares, concentration levels, profit margins and price sensitivity.

The document identifies several key threats to competition, including reduced direct rivalry, diminished innovation, lower investment incentives and limited access to commercially sensitive information. As a counterbalance to the theory of harm, the guidelines also introduce the theory of benefit. They encourage companies to collect evidence demonstrating potential efficiencies and benefits for consumers.

The draft guidelines outline that under the theory of benefit, a merger can allow firms to profitably lower prices, boost output and innovation, or drive higher investment across multiple markets and geographies. Public consultation closed on 26 June 2026, and the EC is expected to finalize the review process in the last quarter of this year.

Key points of difference

An analysis by global law firm White & Case concludes that the "core analytical architecture" of the Merger

Guidelines is preserved. "But it is embedded within a considerably broader and more flexible framework that gives the Commission more tools, more theories of harm to work with, and a more explicit mandate to weigh benefits alongside harms."

Nicholas Hirst, Chief Correspondent, EU Competition at market intelligence firm MLex, considers the "long section" detailing how deals can negatively affect competition one of the biggest changes. This includes risks such as entrenching dominant positions or combining different products in ways that may create cumulative effects and harm customers.

He also highlights the fact that, beyond the benefits for companies and consumers, the EC will assess how mergers contribute to the "wider European project" by supporting innovation, investment, and the resilience of companies and supply chains across the region.

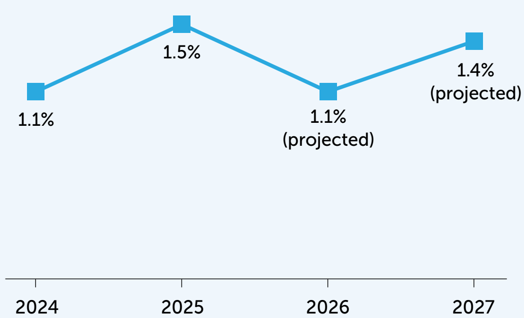
Assessing market impact

For Gerardo Proaño, Managing Director and Head of Competition at FTI Consulting in Brussels, there is a duality to this proposition. On the one hand, the EU is struggling to grow its economy and the merger law and single market integration can attract more investments. Europe's GDP expanded by 1.1% in 2024 and 1.5% in 2025, but the Commission's Spring 2026 Economic Forecast projects growth slowing to 1.1% in 2026.

On the other hand, the EU needs to find ways to prevent excessive concentration. And although investors expect relaxation regarding critical assets, they're still cautious about targeting European companies. Proaño sees digital and defense sectors as the most likely to have a surge in deals. But he also points to the fact that there is some movement among manufacturers. Beyond sectors, he expects more smaller national consolidations in member states.

Although investors expect relaxation regarding critical assets, they're still cautious about targeting European companies.

European GDP growth



Source: European Commission's Spring 2026 Economic Forecast

Since the beginning of the year, the EC has cleared transactions across diverse industries, such as food and component manufacturing, media and digital infrastructure. This involved cross-continental, intra-EU and national transactions. Most deals were approved unconditionally, although a few required remedies and divestments.

The Simplification Omnibus bundle

The EC has also proposed a Simplification Omnibus package, aimed at creating "simpler, clearer and better enforced EU rules". To achieve this, it identified five priority areas. These include simplifying legislation by providing greater clarity on compliance requirements and the consequences of non-compliance; improving the regulatory system through greater transparency, stakeholder engagement and efficiency; and launching an action plan to address inconsistencies, overlaps and "overly complex provisions" in existing regulations.

The remaining two areas focus on helping member states to identify national barriers to the single market that go beyond those established in EU law, as well as ensuring faster and more rigorous enforcement, with a focus on reducing the number of longstanding infringement proceedings.

"Outdated, excessive or overlapping laws must be detected and corrected. New proposals need to be more focused, implementable and enforceable. This is simplification in practice," says Valdis Dombrovskis, Commissioner for Economy and Productivity, and for Implementation and Simplification, at the EC.

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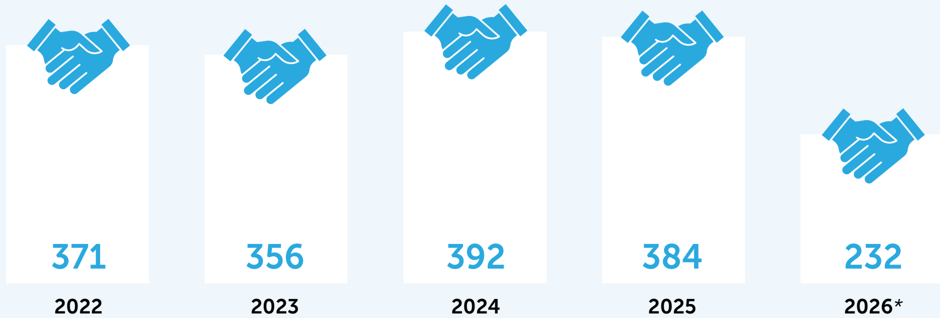
Merger cases notified in the EU



Source: Statistics on merger cases, European Commission
**2026 data covers merger cases notified from 1 January to 31 July 2026*

A stronger single market

Pet industry players are among those closely following these developments, given their potential impact on companies operating in the European market.

In June, Paolo Rigamonti, Regional President Europe Pet Nutrition at Mars, participated in a meeting between the American Chamber of Commerce to the European Union (AmCham EU), which represents US-based companies operating in Europe, and representatives from the European Parliament and EC.

According to Rigamonti, the meeting aimed "to reiterate the importance of the EU-US relationship and how the EU needs to maintain momentum behind its very important simplification agenda". In February, he supported the AmCham EU's calls to strengthen the single market, saying: "A simpler, more consistent regulatory environment helps businesses invest with confidence and boosts the global competitiveness of the region."

Harmonization is good for business

Gordon Bonnet, CEO of the German Pet Trade and Industry Association ZZF, believes the pet sector could benefit primarily from greater regulatory consistency due to the sector's cross-border nature. "Many raw materials are sourced across national borders, while production and distribution often take place in multiple EU countries. As a result, even minor national differences can have a direct impact on costs and efficiency," he explains.

The association highlights, for example, the EU Packaging and Packaging Waste Regulation, as well as documentation and due diligence requirements across supply chains, such as those introduced by the EU Deforestation Regulation, as key areas where greater harmonization between member states is needed.

Putting commitments into practice

Giacomo Fersini, Head of Economic Policy at Eurochambres, the Association of European Chambers of Commerce and Industry, tells PETS International that while the EC plan addresses the right priorities in principle, the real test is implementation.

"Eurochambres members consistently raise three issues linked to the existing regulatory framework: uncertainty on who must comply with what, a confusing accumulation of overlapping rules and inconsistent application across member states," he says.

It's a view shared by Bonnet: "A more integrated single market would promote trade within the EU and foster competition. However, its full potential can only be realized if existing regulatory fragmentation is consistently reduced." According to Fersini, the EU already has a regulation framework that is "better on paper", but there's a "persistent gap" between commitments and delivery in practice.

The EU's communication so far focuses heavily on the Commission's procedural steps for drafting new legislation, but provides less detail on how the European

Parliament and Council amend proposals during trilogue negotiations – discussions between the three EU institutions to agree on the final legal text. According to Fersini, many of the complexities that businesses face stem from changes introduced at this stage.

Where complexity persists

Beyond the broader question of whether the initiative can reduce regulatory complexity, businesses continue to face specific challenges in how EU rules are developed, implemented and enforced. Eurochambres identifies two specific areas where this is the case: the use of secondary legislation and differences in how EU rules are applied across member states.

The first concerns delegated and implementing acts – the detailed technical rules that complement EU legislation and determine how compliance is achieved in practice. According to Eurochambres, these instruments do not undergo the same level of transparency, stakeholder consultation or impact assessment scrutiny as the main legislative acts.

For pet businesses, this issue is particularly relevant as key technical requirements in areas such as veterinary medicines, food additives and product safety are often established through these secondary instruments, sometimes with limited advance notice for smaller operators, Fersini explains.

The second challenge relates to the capacity of member states to implement EU rules consistently. Eurochambres notes that differences in national resources and approaches can lead to varying interpretations and compliance issues.

"The same EU rule can translate into very different practical burdens, depending on where a business operates," Fersini concludes.

A clearer and more consistent framework could support investment, cross-border expansion and consolidation, but companies remain cautious about whether simplification efforts will translate into practical improvements. ◆

TYLER INNOVATIVE PACKAGING

Mono-Material Pouches: The Future of Packaging in the Pet Aisle

At Tyler Packaging, we know pet brands face a unique challenge: delivering high-quality, nutritious products while meeting growing sustainability expectations from consumers, retailers, and regulators. That's why we're leading the way with recyclable-ready mono-material pouches – the future of packaging in the pet aisle.

What Are Mono-Material Pouches?

Traditional multi-layer laminates mix plastics and foil to achieve performance, but they create recycling challenges at the end of life. Our mono-material solutions – all-PE or all-PP – are fully compatible with existing recycling streams. This means easier sorting at recycling plants, higher recycling yields, and a credible route to a circular economy without sacrificing pack performance.

The Sustainability Advantage

Switching to flexible mono-material pouches delivers measurable environmental benefits:

- **Lightweight design:** Reduces transport energy and emissions.
- **Space efficiency:** More units per pallet, less back-of-store storage.
- **Lower carbon footprint:** Mono-PE and mono-PP packs outperform conventional laminates in lifecycle assessments.

For pet brands, this translates to cost savings, reduced environmental impact, and packs that perform as expected on shelf and at home.

Staying Ahead of Regulation

EU PPWR and UK EPR continue to reshape packaging requirements, and both have moved forward significantly over the past year:

- EU PPWR entered into force in February 2025 and became generally applicable across all 27 member states on 12 August 2026, replacing the 30-year-old Packaging Directive. From this date, obligations such as PFAS restrictions and Declarations of Conformity apply. Recyclability grade requirements (A, B or C) follow from 1 January 2030, when all packaging placed on the EU market must be recyclable by design.
- UK EPR fees, which began in October 2025, have now moved into eco-modulation for the 2026/27 fee year. Charges are tied to a Recyclability Assessment Methodology (RAM), meaning poorly recyclable packaging attracts significant surcharges, while better-designed packs qualify for lower rates. Producers with incomplete data automatically default to the highest fee band.

Together, these changes make recyclable-by-design packaging a financial as well as environmental priority. Tyler Packaging helps brands navigate this shifting landscape with solutions that are compliant, cost-efficient, and future-proof.

PFAS-Free by Design

PPWR Article 5 also introduces, from 12 August 2026, strict limits on PFAS ("forever chemicals") in food-contact packaging: 25 ppb for any individual PFAS substance, 250 ppb for the sum of targeted PFAS, and 50 ppm for total fluorine content, whether or not PFAS was intentionally added. For pet food and treat brands, this is a critical compliance point, particularly for grease-resistant coatings and barrier layers.

Tyler Packaging's mono-material pouches are formulated without intentionally added PFAS and are built to meet PPWR thresholds well ahead of the deadline. Our PE and PP structures avoid the fluorinated coatings historically used for grease and moisture resistance in laminates, and we back this up with supplier documentation and test data rather than a self-declaration alone. That means brands using Tyler Packaging pouches can move into the PPWR era with confidence, without last-minute reformulation or testing scrambles.

How Tyler Packaging Designs Circular Pouches

1. **Pick a dominant polymer:**
   PE for dry foods and treats
   PP for retortable wet foods
2. **Design-for-Recycling (D4R):**
   Keep barriers lean (<5%)
   Avoid incompatible inks, adhesives, and layers
3. **Optimise closures and fitments:**
   Fully compatible PE or PP spouts and zippers
4. **Validate with independent certification**:
   Tyler Packaging's solutions are third-party certified and PFAS-tested, helping brands avoid greenwashing, build consumer trust, and meet retailer and regulatory requirements.

Business Benefits

- **Cost efficiency:** Simplified films are easier to source and produce.
- **Freight savings:** Lighter packs, more units per shipment.
- **Compliance advantage:** Early adoption reduces exposure to EPR eco-modulation surcharges and regulatory risk under PPWR, including the PFAS thresholds now in force.
- **Retailer alignment:** Mono-material packs score higher in audits and scorecards.

Tyler Packaging Roadmap for Pet Brands

If you haven't already, over the next 6–12 months Tyler Packaging guides brands to:

1. Map SKUs by material, barrier, and EPR exposure.
2. Standardise polymer choices and simplify pack designs.
3. Run pilots to test machinability, shelf-life, and seal integrity.
4. Collect pack-level data for compliance reporting, ahead of RAM assessment cut-offs.
5. Explore recycled content for primary and secondary packaging.

Tyler Packaging's recyclable-ready mono-material pouches let pet brands:

- Reduce weight, cost, and compliance risk
- Maintain pack performance and consumer experience
- Build trust with independent certification

With PPWR now fully in force across the EU and UK EPR fees eco-modulated from 2026, there's no better time to simplify, standardise, and future-proof your packaging.

Tyler Packaging is your partner in making the circular economy a reality – today.

For more information, visit our website www.tylerpackaging.co.uk or visit our social channels.

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Pet industry moves beyond compliance in sustainability

Environmental strategy is evolving to encompass more than just emissions and packaging, as businesses invest in regenerative agriculture, water stewardship and supply chain resilience.

Diana Dominguez
Business Reporter
GlobalPETS

There are numerous examples of initiatives successfully tackling the pet sector's most common sustainability priorities, which include greenhouse gas (GHG) measurement, packaging compliance and redesign, supply chain engagement and reviewing claims. Companies at the forefront of sustainability are now also broadening their efforts to address a wider range of issues. What are the latest developments, and which areas should industry players keep an eye on?

Road to net zero

The reduction of fossil fuel usage remains one of the key sustainability indicators in the pet industry. Companies continue to accelerate efforts to reduce GHG emissions through renewables, energy efficiency and fleet electrification as they work toward long-term net-zero targets.

Mars is reducing direct emissions through renewable thermal solutions, electric vehicle deployment and energy efficiency improvements. Together, these initiatives increased renewable sources to account for almost 40% of the total electrical and thermal energy used. The company's progress earned it the Reuters Sustainability Award for Net Zero Leadership in 2025.

Making changes to electricity supply

To obtain 85% of its required electricity supply from renewable sources, animal health multinational Zoetis used electricity generated by solar arrays at eight sites.

The company also reduced fleet emissions by expanding its use of hybrid and electric vehicles, comprising more than half of its fleet. By implementing these changes, Zoetis met its target of reducing transportation-related emissions intensity by 25% compared with its 2019 baseline.

Global health and nutrition company H&H Group revealed that renewable sources covered the supply of 100% of its electricity consumption in its 2022 Sustainability Report. This milestone was achieved by on-site generation through solar panels (5% of total consumption), purchasing renewable energy certificates, and green tariffs.

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General Mills has achieved similar results, with renewable sources now meeting 98% of its electricity needs. This is made possible by generating biogas, biomass and solar energy at its facilities and by virtually purchasing renewable electricity.

Meanwhile, US pet food company Freshpet opted to upgrade its chiller fleet, improving energy efficiency by 39.3%. This reduced annual electricity consumption – despite the company adding more units.

Freshpet also avoided an estimated 1,169 tonnes of GHG emissions during the year through its on-site wastewater treatment plants. Instead of being sent to landfill, the organic material was converted into electricity through anaerobic digestion or processed into fertilizer for agricultural use.

A comparable approach has been adopted by General Mills, which is processing part of the solid waste from its production to use for energy recovery. These initiatives show that companies are increasingly merging multiple strategies to achieve carbon targets.

Advances in sustainable packaging

Another area where manufacturers can make considerable sustainability gains is in packaging. All

As manufacturers seek to reduce freshwater consumption and improve reuse in production, water stewardship is becoming a growing focus across the pet industry.

eyes were on European efforts in this arena earlier this year, when flexible packaging producer Gualapack Ukraine won the World Packaging Organisation WorldStar 2026 Award in July.

The prize was awarded for its mono-material pouch for Lviv-based pet food producer Kormotech. Since every element in a mono-material package is made from the same type of polymer, such packaging does not require components to be separated before recycling and it can be processed within a single recycling stream.

According to Gualapack Ukraine, the success of this project proves that the transition to sustainable packaging solutions is possible without compromising quality or product protection.

Meanwhile, the American Packaging Corporation (APC), a flexible packaging solutions producer, expanded access to circular packaging by making Certified-Circular Content solutions available across its six centers. Its materials enable producers of pet food and other brands to replace virgin fossil-based plastics with certified recycled content suitable for direct food-contact packaging.

Less waste destined for landfill

Last year, Mars Petcare expanded its recyclable packaging efforts by introducing recyclable WHISKAS pet food pouches, reducing the packaging's carbon footprint by 46%. The company's Veterinary Health business launched a specialty plastic mail-back recycling project globally, diverting 4.3 tonnes of plastic from landfills.

Indiana-based pet food producer Midwestern Pet Foods reduced landfill waste in partnership with recycling company TerraCycle. Its food and treat packaging (made from 25% recycled material) can be 100% recycled through the TerraCycle program. To date, the brand has recycled more than two million bags, diverting in excess of 93,000kg of waste from landfill.

Certification builds trust

With environmental claims under ever-closer scrutiny, many businesses are seeking third-party certifications. Renaud Gautier, Key Account Manager Pet Food at Austrian packaging company Coveris, notes that the ability to demonstrate improvements through the supply chain is becoming a key part of building trust among consumers.

"Certification helps simplify [the process of increasing levels of recycled content and circularity performance] by providing third-party verification of recycled-content sourcing and use, reducing risk around sustainability claims and supporting compliance efforts," he tells PETS International.

The company recently announced that three of its European sites – one in the UK and two in France – have achieved the highest certification currently available under the RecyClass scheme. This initiative verifies whether recycled plastics are responsibly sourced, accurately tracked and incorporated into packaging at certified levels.

Meanwhile, German ingredients supplier Symrise recently earned the highest rating in the Supplier Engagement Assessment of CDP, a global environmental disclosure organization.

The recognition acknowledges the company's efforts to advance sustainable sourcing. These include expanding digital emissions tracking and traceability tools to provide customers with greater transparency, and to support reductions in the indirect (Scope 3) emissions generated across the value chain.

Other value chain initiatives

Another example of a Scope 3 initiative comes from Phibro Animal Health. The company has launched its Sustainable Solutions Platform and the brand Verratain Verified Sustainability Solutions, offering a portfolio of low-carbon feed ingredients. The products are designed to help pet food producers reduce Scope 3 emissions by lowering the carbon intensity of feed.

Similarly, dsm-firmenich Animal Nutrition & Health introduced its Sustell carbon value program, which combines ISO-assured carbon footprint measurements, emissions transfer protocols and animal nutrition expertise to help companies reduce emissions and comply with reporting requirements.

Investments and alliances

In the past year, various pet sector companies have embarked on new investments, alliances and initiatives to advance new and innovative sustainability strategies. Such efforts are increasingly focusing on regenerative agriculture, alternative and lower-impact proteins, supplier-specific life cycle data and circular packaging systems, according to Allison Reser Hamburger, Director of Sustainability & Innovation at the Pet Sustainability Coalition (PSC).

Some players are also widening their perspective to consider environmental impacts that have traditionally received less attention. "Nature-related goals – including biodiversity, water stewardship, soil health and land-use impacts – are still less common in the pet sector. But much of the industry's footprint is connected to agricultural ingredients, animal-derived inputs, forestry-based materials and water-dependent supply chains," Reser Hamburger says.

The rise of regenerative agriculture

The adoption of regenerative agriculture is being driven by strategic partnerships across the broader food and beverage sectors, including pet food. For instance, human and animal nutrition company ADM expanded its regenerative agriculture efforts through a multi-year partnership with Colgate-Palmolive's pet business, Hill's Pet Nutrition. The collaboration covers about 16,000 acres of corn and soybean fields in the US and 2,500 acres of soybean fields in Hungary.

At the same time, pet food manufacturers are working with retailers to scale these practices. General Mills has partnered with Walmart and its retail warehouse subsidiary Sam's Club to accelerate regenerative agriculture across 600,000 acres by 2030, including to supply its pet food brands.

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The ability to demonstrate environmental improvements through the supply chain is becoming a key part of building trust among consumers.

General Mills describes regenerative agriculture as a concept that "treats the health of soil, water, plants, animals, people and planet as interconnected, and places life at the center of every action and decision. Through regenerative agriculture, farmers and ranchers produce good food for people in ways that protect, enhance and foster life, by harnessing powerful ecological processes and cycles rather than trying to bypass or overcome them".

Improving water stewardship

As manufacturers seek to reduce freshwater consumption and improve reuse in production, water stewardship is becoming a growing focus across the pet industry. Companies are investing in rainwater harvesting, wastewater treatment and closed-loop systems to lower operational water demand while supporting broader sustainability goals.

These and other examples indicate that significant industry-wide progress is being made in measuring environmental impacts, preparing for packaging regulations, reviewing sustainability claims, and ensuring company-level integration of sustainability into sourcing and business strategy.

The approach reduces freshwater consumption at facilities in the Netherlands, Spain and Poland. In addition, 15 of the company's plants operate on-site wastewater treatment facilities that recycle and purify water.

And in the US, Freshpet has expanded reuse across its operations. Wastewater at its 15,000sq ft treatment facility is reused in the cooling system at its Kitchen production facility in Texas. And in Pennsylvania, underground reservoirs capable of storing up to 427,500 gallons (over 1.6 million liters) of rainwater supply irrigation for 62,000sq ft of landscaping.

Keeping up the pressure

These and other examples indicate that significant industry-wide progress is being made in measuring environmental impacts, preparing for packaging regulations, reviewing sustainability claims and company-level integration of sustainability into sourcing and business strategy.

However, the industry still lacks comparable public data, making it difficult to assess sector-wide emissions reductions and overall sustainability performance. Currently, the PSC classifies the pet industry as being at "an early-to-mid stage of sustainability maturity".

"The biggest challenge is balancing cost, compliance and ambition. Pet companies are operating in a more complex environment: affordability pressure remains high, regulations are expanding, and often small sustainability teams are being asked to show clearer business value," concludes the PSC's Reser Hamburger.

Nevertheless, the association expects policy to continue moving toward practical improvement over time, especially targeting lower material intensity, verified claims and stronger incentives for companies that make measurable progress. ◆

In the past year, pet companies have embarked on efforts focused on regenerative agriculture, alternative proteins, supplier-specific life cycle data and circular packaging systems.

LitPet UK

LitPet's pill-free approach to joint care

New joint supplement pairs European science with Traditional Chinese Medicine botanicals.

As pet humanization accelerates, proactive joint care has become a growing priority for owners determined to protect their companions' mobility, comfort and vitality.

In a competitive pet joint supplement market projected to exceed $2.5 billion (€2.2B) by 2030, LitPet® introduces a differentiated solution designed for efficacy and real-world ease of use.

Beyond tablets and chews

Traditional joint products often force buyers to compromise between hard tablets that create 'pill trauma' and soft chews that trigger 'treat guilt' because of added calories, filler starches and synthetic gums. In response, LitPet has launched LitPet FlexiGuard™ Joint Care, a clinical-grade micro-powder supplement for both cats and dogs.

The product targets ingredient-conscious millennial and Gen Z pet parents caring for senior pets aged seven-plus or breed-prone companions such as dachshunds, French bulldogs, ragdolls and Maine coons. At the heart of the formula is French-patented Xelflex®, a bioactive milk protein hydrolysate containing targeted bio-peptides.

Supported by clinical research, Xelflex is positioned to help address inflammation and joint edema, and protect cartilage and collagen structures. In line with LitPet's Dual-Lab philosophy, this Western active is paired with standardized Traditional Chinese Medicine botanicals selected to support tendon nourishment, microcirculation and bone health.

Overcoming buyer hesitation

A typical customer is a young urban pet owner who notices her 10-year-old cat has become slower to jump, less playful and stiffer in the morning.

She wants to act early, yet hesitates because tablets feel stressful, chews seem unhealthy and many powders appear too bitter, too vague or too dog-focused. LitPet's answer is an odorless, hyper-palatable micro-powder that can be sprinkled directly onto daily meals, creating a zero-friction routine.

More than a supplement

On the surface, consumers may think they are simply purchasing a joint supplement. In reality, the emotional value runs far deeper: the hope that a beloved pet stays active longer, the comfort of acting before decline worsens and the relief of avoiding a daily feeding struggle.

Manufactured in Ireland and FEDIAF-aligned, LitPet FlexiGuard also appeals to distributors, veterinary groups and premium pet retailers seeking compliance confidence and clean-label differentiation.

By combining European science, botanical wisdom and effortless administration, LitPet sets a compelling new benchmark for modern pet bio-wellness.

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for probiotics
With Vitamin B12
Bentonite
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Metabolites that promote
healthy bowel function
EXCELLENT
★ TASTE ★
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Promotes a strong immune system.
Improves stool consistency.
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We are all one

Bioiberica SPAIN

The vitamin missing from most canine gut supplements

Bioiberica's Probioplus pairs three biotics with a clinically relevant dose of vitamin B12.

Gastrointestinal upset is one of the most common health complaints in dogs: around 30% will experience a digestive disorder in their lifetime, usually triggered by stress, antibiotic treatment or a change of diet.

The B12 connection

Less widely known is that these episodes often coincide with a drop in vitamin B12, since an inflamed gut absorbs the vitamin poorly. Few probiotic supplements on the market address this connection directly, even as owner interest in B vitamins rises.

Consumer interest in B-complex vitamins for pets rose from 12% to 21% between 2021 and 2023, according to marketplace data, pointing to demand for products that combine several functional ingredients in one format. The wider category of pet probiotic supplements was worth $780 million (€681M) in 2024 and is forecast to reach $1.1 billion (€960M) by 2034.

That gap led Bioiberica, a Spanish life-science company with 50 years in bioactive ingredients, to develop Probioplus. Rather than relying on a single mechanism, the product combines three complementary elements: a spore-forming probiotic, prebiotics and a postbiotic, supporting the gut microbiota from multiple angles at once.

It also includes a dose of vitamin B12 based on a peer-reviewed veterinary study on oral cobalamin supplementation in dogs with chronic enteropathies, a dose markedly higher than comparable products currently sold in the category.

Built for the shelf

The probiotic strain, Calsporin (*Bacillus velezensis* DSM 15544), is spore-forming and heat-resistant, tolerating 90-100°C during manufacturing, a property most probiotic strains lack. That gives Probioplus a 36-month shelf life without refrigeration, an advantage that eases storage and shipping for distributors and retailers managing stock across different climates and supply chains.

Independent studies cited by Bioiberica associate the strain with increased fecal microbial diversity, improved stool consistency and elevated fecal immunoglobulin A (IgA), an indicator linked to immune support. Palatability was also a development priority. In blind testing, Probioplus achieved high acceptance and intake levels among dogs, helping support owner compliance and a positive supplementation experience at home.

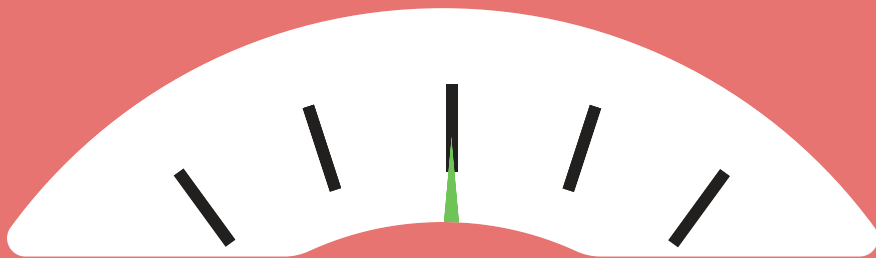
Probioplus is formulated for dogs of all breeds, sizes and ages, administered as one 1g sachet per day. It is manufactured by Bioiberica, which produces functional ingredients for the pharmaceutical, nutraceutical, veterinary and agricultural sectors, exports to more than 80 countries and operates nine production sites worldwide.

Seeking distribution partners

Following its 2025 launch in Spain, Bioiberica is now looking for distribution partners for Probioplus in new markets. For more information, please contact pethealth@bioiberica.com ◆

Bioiberica, S.A.U.
bioiberica.com

Puppy fat: tackling dog obesity through the gut



Prebiotics and probiotics are gaining attention as useful tools in weight management, as research reveals their role in canine metabolic health.

Ana Rita Amaral
Veterinary Surgeon
Small Animal Nutritionist

As a growing focus of scientific scrutiny, the intestinal microbiome provides valuable insights into metabolic pathways and offers practical applications for health. Understanding how microbiome composition contributes to the development and persistence of obesity in dogs is driving the development of nutraceuticals to tackle excessive weight.

Obesity as a health problem

As a multifactorial disorder, obesity is highly prevalent among dogs in developed countries. In addition to genetic predisposition, the relationship between the owner and the pet contributes to its onset.

With pets increasingly regarded as family members, owners may contribute to excessive energy intake by offering treats and table scraps as a form of reward or affection. Furthermore, modern lifestyles may limit the frequency and duration or dog walks, reducing opportunities for physical activity. As a result, overweight dogs experience reduced quality of life and life expectancy, as well as an increased risk of developing other conditions, including cardiovascular disorders, osteoarthritis, diabetes, dyslipidemia, respiratory diseases and cancer.

Treatment typically involves inducing a negative energy balance through the use of a therapeutic diet combined with increased physical exercise. The main goal is to promote a gradual and sustainable reduction in body fat while preserving lean body mass and maintaining adequate nutrient intake.

Moving towards adjunctive therapies

Successful weight management in dogs can be challenging due to owner compliance and individual variability in energy requirements. As a result, adjunctive therapies, such as the development of innovative prebiotic and probiotic formulations, have gained interest as complementary strategies to support a healthier and effective weight-loss process.

The intestinal microbiome is characterized by the complex interaction between the host, the microorganisms inhabiting it and the metabolites they produce. This interplay has a substantial influence on nutrient absorption, immune responses, intestinal homeostasis, host metabolism and many other physiological processes.

In dogs, the composition of this ecosystem is influenced by several factors, including age, diet and medication use. And although there are species-specific patterns in intestinal microbiota configuration, some variations exist. Consequently, studies in both dogs and humans have shown that disruption of intestinal homeostasis and alterations in gut microbiota composition are associated with various diseases, including obesity.

It remains unclear whether intestinal dysbiosis contributes to the development of obesity or whether adiposity excess itself drives alterations in gut microbial composition. However, current evidence suggests that managing this metabolic disorder involves more than regulating energy intake and expenditure.

Prebiotics: spotlight on beta-glucan

Similar to overweight humans, obese dogs frequently exhibit altered blood glucose concentrations, insulin resistance and dyslipidemia.

Numerous studies in both humans and dogs have demonstrated the ability of dietary fibers, particularly soluble fibers and prebiotics, to reduce postprandial hyperglycemia, improve insulin sensitivity and increase the secretion of glucagon-like peptide-1 (GLP-1).

Therefore, fibers and prebiotics could be used to improve postprandial glycemic responses in overweight and obese dogs.

A study from the University of São Paulo, Brazil, published in *BMC Veterinary Research* in 2022, demonstrated that dietary supplementation with 0.1% beta-glucan for 90 days in obese dogs promoted important metabolic improvements, including reductions in blood glucose, cholesterol, triglycerides and basal insulin concentrations.

Additionally, supplemented dogs exhibited TNF-α (a chemical messenger produced by the immune system that triggers inflammation) concentrations similar to those of dogs at an ideal body weight and increased levels of GLP-1, a hormone associated with appetite and satiety regulation. These findings suggest beneficial effects of beta-glucan on carbohydrate and lipid metabolism, as well as for appetite control.

Inulin supplementation

Beneficial effects have also been observed with supplementation of 5% inulin, a natural soluble dietary fiber and prebiotic polysaccharide, regardless of its degree of polymerization, in dogs fed a high-fat diet.

Potential effects include reductions in body weight, subcutaneous fat, triglycerides, free fatty acids and inflammatory markers such as lipopolysaccharides and IL-6. High-polymerization inulin produced more pronounced effects, reducing adipocyte size, attenuating adipose tissue inflammation and increasing gut microbial diversity.

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As noted in findings published in *Research in Veterinary Science* in 2022 from a Chinese research team, inulin supplementation also favorably modulated the microbiota by increasing the abundance of genera associated with protection against obesity, such as *Bifidobacterium* and *Akkermansia*, while reducing bacteria linked to inflammation and metabolic endotoxemia.

These changes were accompanied by a partial reversal of the dysbiosis induced by the high-fat diet, suggesting that inulin may contribute to obesity management through modulation of the intestinal microbiota, inflammation and lipid metabolism.

In another study, published in the *British Journal of Nutrition* in 2018, researchers from the University of Illinois used overweight female Beagles to demonstrate that inulin supplementation for 70 days promoted favorable changes in intestinal fermentation and microbiota composition, with dose-dependent effects.

The highest dose significantly increased fecal butyrate production and total short-chain fatty acid concentrations, while also increasing the abundance of potentially beneficial genera such as *Eubacterium* and *Turicibacter.* Increased bile acid excretion and a reduction in *Coprobacillus* were also observed.

Probiotics as part of obesity management

Research from South Korea's Gachon University, published in 2024 in *Scientific Reports* and evaluating probiotics as part of canine obesity treatment, has yielded promising results. Supplementation with *Lactiplantibacillus plantarum* (2.5×10^9 CFU/day) and *Bifidobacterium breve* (2.5×10^9 CFU/day) for 12 weeks, administered at a dose of 3g twice daily, resulted in weight loss in 100% of overweight and obese dogs.

In contrast, only 10% of dogs in the control group, which did not receive probiotics, lost weight. In addition, significant reductions in serum triglyceride and total cholesterol concentrations were observed.

The treatment also modulated the intestinal microbiota, increasing the abundance of *Lactiplantibacillus* while reducing microorganisms associated with obesity, adiposity, hepatic steatosis and metabolic dysfunction. By the end of the study, *Peptacetobacter*, a bacterium involved in bile acid metabolism, became predominant. This metabolic pathway is associated with improved insulin sensitivity, glycemic homeostasis and liver function.

Another study, led by a team from South Korea and published in *Microbiology Spectrum* in 2024, evaluating different probiotics found that in dogs fed a hypercaloric diet, supplementation with *Enterococcus faecium* (10^{10} CFU/day) or *Bifidobacterium lactis* (10^{10} CFU/day) for nine weeks significantly attenuated diet-induced weight gain.

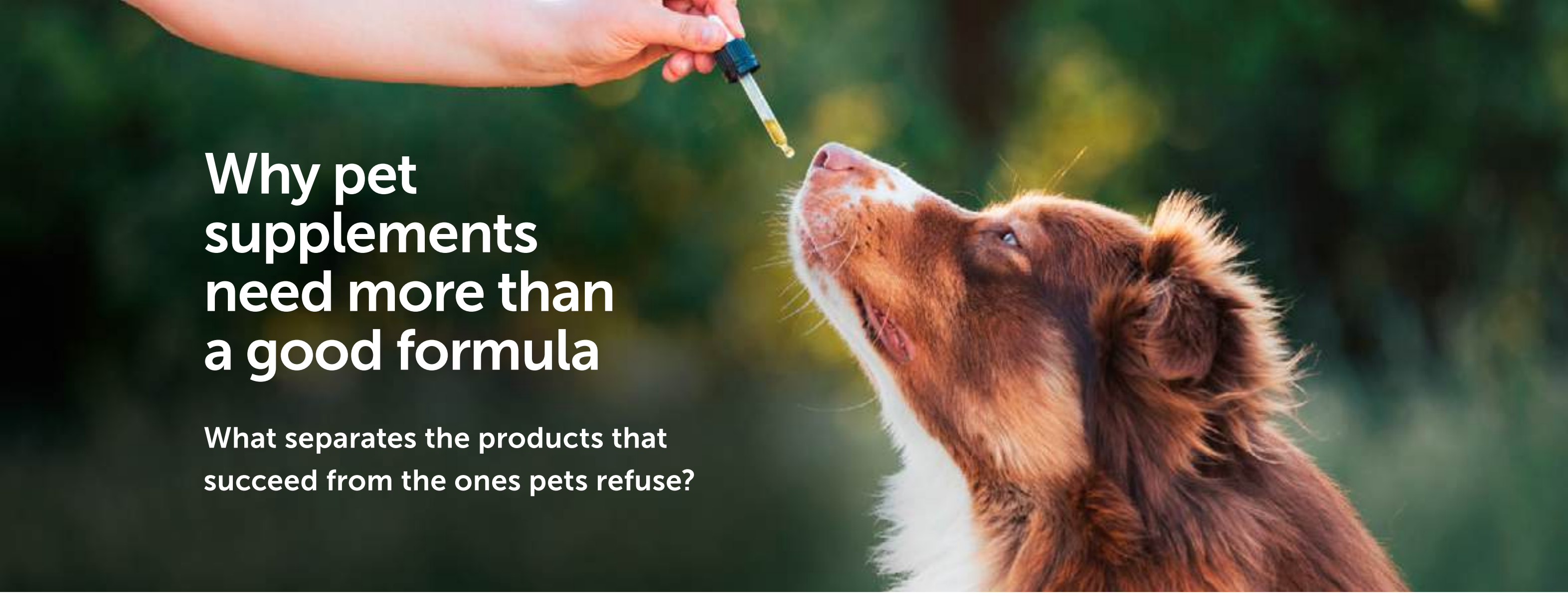
Compared with dogs receiving only the high-fat diet (22% ether extract), supplemented dogs exhibited lower final body weight, reduced body fat accumulation and an improved lipid profile characterized by lower triglyceride concentrations, which had otherwise increased substantially in response to the hypercaloric diet.

Finally, researchers from Jilin University, Changchun, observed that Beagles fed a high-fat diet for nine weeks and supplemented with *Akkermansia muciniphila* (2×10^9 CFU) were protected against the increase in body condition score seen in dogs receiving only the hypercaloric diet. Published in *Molecules* in 2022, the study furthermore found that the probiotic significantly modulated diet-induced alterations in the intestinal microbiota, suggesting a protective effect against both weight gain and obesity-associated dysbiosis.

Time to build on promising start

Taken together, these findings suggest that prebiotic and probiotic supplementation may contribute to body weight management and improvement of the metabolic profile of obese dogs through modulation of the intestinal microbiota. However, the amount of robust and well-established evidence remains limited, representing a significant opportunity for innovation in this field. ◆

Research findings suggest the beneficial effects of beta-glucan on carbohydrate and lipid metabolism, as well as for appetite control.



Why pet supplements need more than a good formula

What separates the products that succeed from the ones pets refuse?

Charlène Buisson
Group Marketing Manager
Naturacare
naturacare.com

The pet supplement market is becoming more structured, technical and demanding. As pet owners look for targeted wellbeing solutions, brands face a challenge: products that are not only relevant on paper, but also easy to use, accepted by pets and reliable from a regulatory and manufacturing perspective.

New expectations are also shaping the category. Microbiome support, immune balance, stress, mobility, and skin and coat are increasingly influenced by trends from human nutraceuticals. Pet care brands are considering a broader 'one health' approach, connecting pet wellbeing, human expectations and more responsible product choices.

Designing products for real-life use

In pet supplements, success no longer depends on formulation alone. Dosage form, packaging, palatability and excipient choices all influence product acceptance and long-term use.

Divisible tablets, powders and liquids do not address the same use case, species or owner behavior. Liquids, for example, are particularly relevant when flexible dosing is required according to the pet's body weight, or when targeting cats, which are often more difficult to supplement.

Palatability is another decisive factor. A technically strong product can still fail if the pet refuses it. Taste, smell, texture and format influence acceptance and compliance. Every ingredient matters: choosing suitable excipients and palatants while paying attention to allergens and species-specific sensitivities.

From concept to market

This is where experienced contract development and manufacturing organization (CDMO) partners can make a difference. With more than 10 years of expertise in pet care and a dedicated site in Italy, Naturacare supports brands in turning pet supplement concepts into feasible, compliant and market-ready products.

Having a site dedicated to pet supplement production is not common. The company brings R&D and regulatory support from the earliest project stages, helping brands assess formulation feasibility, ingredient choices, compliance and packaging options. Its site in Modena is authorized for complementary feed production and offers capabilities in tablets, powders and liquids.

Private label or tailor-made

Naturacare proposes two development routes. For brands looking to reduce time-to-market, NaturaGo® Pet offers a private label range with 18 products across eight key segments: joints, liver support, digestion with probiotics, respiratory comfort, immunity, stress, skin and coat, and oral care. For more differentiated needs, tailor-made developments start from a customer brief.

By combining pet supplement expertise with experience in human nutraceuticals, the company helps identify emerging opportunities and translate them into concepts for dogs and cats, acting as a proactive innovation partner. ◆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How digestive health is rewriting the pet food playbook

As consumer demand and product innovation continue to align, manufacturers are looking at ways to expand the segment using the latest technology.

Sahiba Puri
Global Insight Manager Pet Care
Euromonitor International

Modern medicine has long recognized the gut's role in improving immunity, metabolism and overall wellbeing. This understanding now extends to pets, too. While prebiotics and probiotics have been used in pet healthcare for some time, they're increasingly making their way into packaged pet food and treats.

Acknowledged benefits for humans

Long before modern nutritional science caught on, the age-old and cross-cultural practice of eating fermented foods was understood to offer benefits for the gut and for broader health. Findings from Euromonitor's 2026 Consumer Health & Nutrition Survey, conducted among 490 Europeans, tell us why probiotics are being consumed today.

This year, digestive health (53% of the respondents) and general health (44%) are still the main reasons for consumption, followed by supporting the immune system (42%). While the importance of these benefits is virtually unchanged compared to previous studies, anti-inflammatory (30%) and liver health (28%) have gained in prominence, suggesting a desire for more targeted health improvements. Other benefits, such as improved energy, sleep and mood, plus joint health, also score between 20% and 30%.

A key to wellness

The gut is widely considered to be a pet's health command center. Its pivotal role is driving a decisive shift towards gut-first formulations. Today, the benefits have expanded beyond the supplements aisle and become a cross-category growth lever, elevating daily feeding and treating occasions into wellness-delivering moments.

For category managers, this redraws the competitive scope as clinical credibility becomes increasingly important beyond the therapeutic aisle.

Tracking product claims

Through ingredients, functional benefits and on-pack claims, pet food brands indicate the expected health improvements to be gained from consumption. Within this functional landscape, digestive and gut health serve as high-value benefits, delivering visible validation in a relatively short timeframe. In doing so, digestive and gut health-oriented pet food innovations position everyday nutrition as the first line of defense in preventative pet health management.

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Digestive and gut health-oriented pet food innovations position everyday nutrition as the first line of defense in preventative pet health management.

The opportunity for brands is to move from one-size-fits-all biotic blends to recipes calibrated to an individual pet's microbiome.

According to Euromonitor's Passport Innovation tool, 32% of all new pet food launches tracked online during the first half of 2026 carried the claim 'prebiotic' and 14% mentioned 'probiotic' in their communication. This is a similar picture to 2025, suggesting continuing investment by manufacturers in biotic ingredients. The claims are found across the whole pet food and treats segment.

Prebiotics got there first

Traditionally, pet care products relating to digestive health were mostly found in the supplements category. Today, as pet food and treat formulations become more advanced, manufacturers are claiming digestive benefits through biotic strains in packaged pet food and treats.

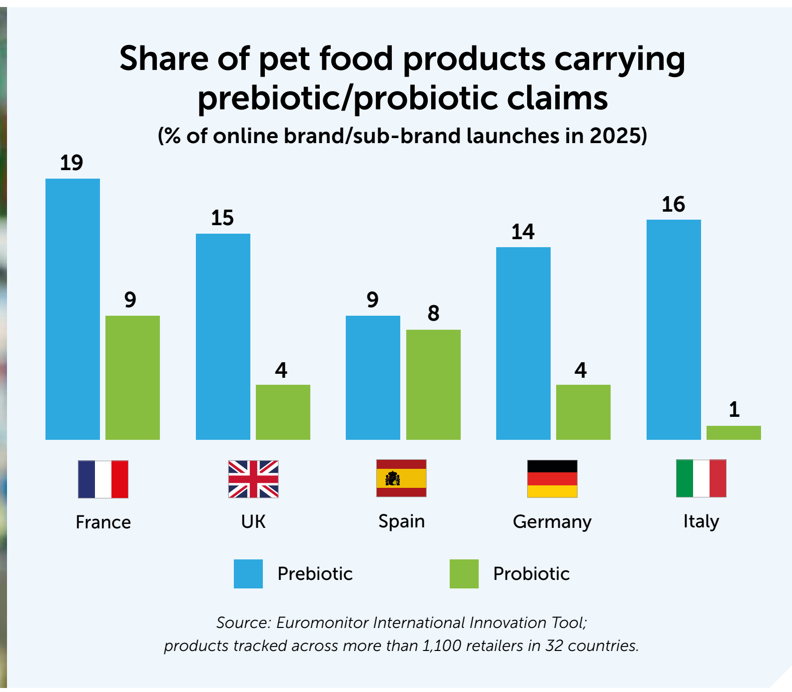
A five-year ingredient analysis using Euromonitor's Ingredient Trend Spotter reveals the workhorse trio doing the heavy lifting in prebiotic formulation today. These leading ingredients in pet brand launches in the past five years are fructooligosaccharides (FOS –15%), inulin (14%) and mannan oligosaccharides (MOS – 12%). The data for this analysis was collected from more than 1,100 retailers across 80 countries, using back-of-pack information to identify established and emerging ingredients.

The stability of prebiotics during high-heat pet food processing technologies has made them the biotic of choice for innovation. Hill's Pet Nutrition, for example, introduced its ActivBiome+ Multi-Benefit technology to certain lines for cats and dogs in its Hill's Science Diet in 2025. The blend of prebiotic fibers and antioxidants is designed to promote digestive, immune and organ health. This kind of proprietary technology establishes strong clinical authority for a brand, while justifying premium pricing.

Dog treats that perform

In the functional dog treats category, UK brand THE PACK and German biotech startup MicroHarvest joined forces to create and launch Gut Bites in 2025. This is a microbial protein dog treat featuring MOS plus chicory root (containing inulin) to feed beneficial gut bacteria.

MicroHarvest's Portuguese production base also indicates Iberia's emergence as a hub for next-



generation pet ingredient innovation. It is developments like these that expand pet treats from indulgence products into a performance category, while enhancing value proposition through multifunctional use.

Probiotic-friendly processing

To counter the effects of high-heat processing on probiotics, dry pet food formats used to have to rely on post-processing approaches such as spraying the kibble after extrusion. While an effective workaround, the viability for shelf life and transit to gut remains questionable. Today, innovative technologies like cold-pressed processing – plus formats like fresh – tend to be more probiotic friendly. They reduce the need for workarounds and offer more stable, better integrated probiotic delivery.

Dutch brand Dog Lovers Gold offers a cold-pressed formula that is enriched with the live probiotic strain *Enterococcus faecium*. The brand claims that this method enables the preservation of the nutrients in natural ingredients to the best extent possible.

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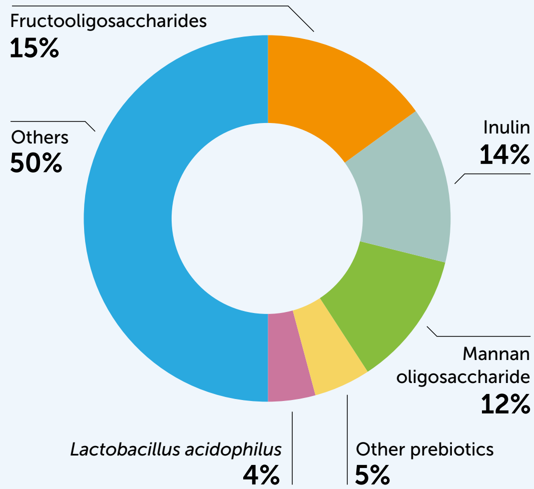
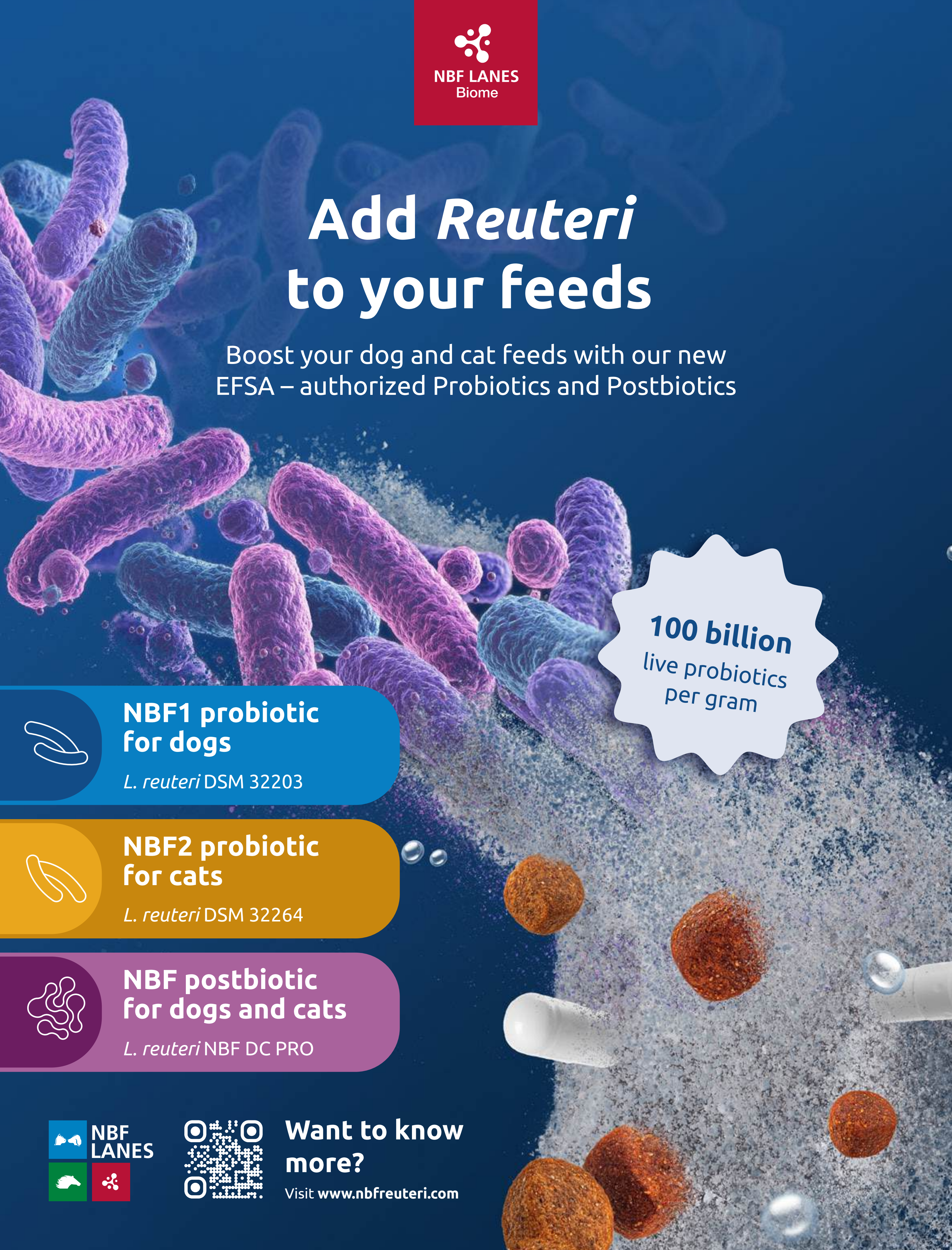
Leading biotic ingredients in pet food 2021-2026*

(% average share of online brand/ sub-brand launches)



Source: Euromonitor Passport
**2026: until 21 June 2026*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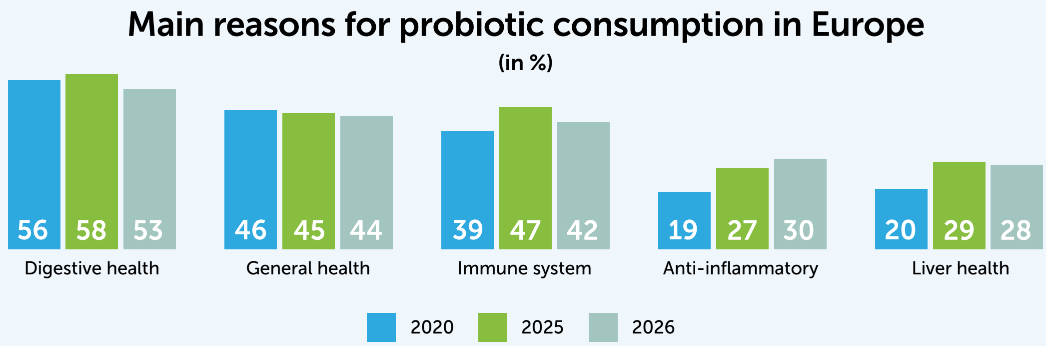

Source: Euromonitor Voice of the Consumer: Health and Nutrition Survey, February 2026 (n= 2020: 670; 2025: 484; 2026: 490)

New-age pet food processing technologies are changing the rules of the gut health category. They enable companies to move away from simply listing probiotics as ingredients to ensuring the survival and efficacy of a biotic strain – a critical lever to stand out from a crowd of overused pet food claims.

Vital role of ingredient suppliers

Format and processing are only one half of the probiotic story. The other half is written much earlier – by ingredient suppliers. Enhancing the viability and efficacy of probiotics in the gut is not limited to technologies and product categories. So the ingredient suppliers play a critical role in the research and development of newer, targeted and more efficient strains.

A recent innovation came from IFF Health Sciences, which has launched a targeted probiotic strain sourced from the canine microbiome. The company claims the strain – *Limosilactobacillus reuteri* – has demonstrated efficacy for canine health and wellness in a placebo-controlled study. Developments like these underline the depth of investment now flowing into gut microbiome science across the value chain.

Where the industry is heading

The next chapter of gut health in pet care will certainly involve fewer marketing claims and more measurable outcomes. Science-backed strains, smarter processing and visible efficacy will separate the credible from the commoditized. Two shifts will define the following phase: AI-led personalization and format innovation.

AI-led personalization will reset the formulation playbook. China is offering the earliest preview of what this looks like at scale. In 2025, Myfoodie launched WarmData, a system that gathers and interprets real feeding behavior to finetune recipe development. PETKIT is another example: embedding intelligence into feeders, litter boxes and water dispensers to recognize individual pets, track behavior and flag early signs of ill health.

For digestive and gut wellness specifically, this matters. Stool quality, water intake, meal patterns and gut transit cues can now be captured passively at home and fed back into product design. The opportunity for brands is to move from one-size-fits-all biotic blends to recipes calibrated to an individual pet's microbiome, life stage and daily rhythm.

Solids to liquids and beyond

Format innovation will stretch the gut health segment. Pet food, treats and supplements have so far carried the category. The next wave is liquid, with functional pet drinks, broths and water enhancers carrying live cultures and fibers designed for gut support. The appeal is twofold: hydration is an under-addressed daily need, and liquid formats sidestep many of the heat-stability challenges that have constrained dry food innovation.

The next five years will bring rewards for three strategies: investing in clinical evidence, building AI-led personalization capability and expanding gut health support into new formats. Brands that can act on all three look likely to define the category. ◆

Exploring the dimensions of palatability with bone broth

As toppers move from picky-eater fix to enrichment, a familiar ingredient fits the brief.

Irene Plats
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Palatability remains a fundamental measure of pet food performance, but its importance extends beyond ensuring sufficient intake.

Research also points to an emotional dimension: the sensory properties of pet food evoke responses in owners too, linking the pet's eating experience to their perception of the product.

For pet food and treat manufacturers, this opens the door to formulations that combine the palatability pets respond to with nutritional value and an ingredient story owners easily understand.

The growing opportunity in toppers

Meal toppers are one format where palatability, nutrition and owner engagement come together. Jakob Lassen, Veterinarian and Business Manager at Essentia Protein Solutions, sees great potential in healthy, tasty toppers based on bone broth:

"As reported by GlobalPETS earlier this year, food toppers are gaining popularity – not only as a way to encourage picky pets to eat, but even more so as a way to add nutrients and provide enrichment and mental wellbeing. Bone broth fits naturally into this space," he explains.

The increasing demand for toppers reflects a broader approach to feeding, where owners actively enhance and personalize their pets' meals. Adding a topper can make the eating experience more appealing while giving owners an opportunity to add something they perceive as beneficial.

More to the bowl

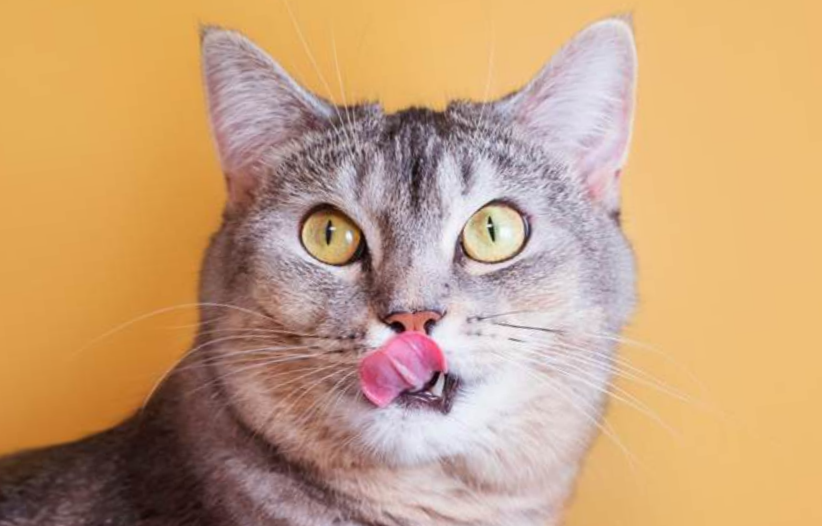
PalPremio™ Bone Broth is based on a simple principle familiar from human food. Animal bones are cooked in water to release their natural components, including protein and collagen, while developing a rich, meaty taste and aroma.

Available as beef, pork and chicken bone broth, the PalPremio range enables manufacturers to match the broth to different formulations and preferences. The ingredients are supplied as convenient powders and can be coated onto kibbles, incorporated into wet food and treats, or used in formulations for meal toppers.

This versatility means bone broth can perform more than one role. It contributes to palatability while adding protein and naturally occurring collagen to the nutritional profile. At the same time, its straightforward origin supports the growing demand for recognizable ingredients and clean-label pet food concepts.

Lassen adds: "With its meaty taste and aroma combined with protein and naturally occurring collagen, PalPremio Bone Broth can support both the sensory and nutritional aspects of the meal." ◆

The latest frontiers in pet food enhancers



Palatants are expanding beyond traditional fats and proteins to combine taste appeal with gut health and sustainability benefits.

Sarah-Jane Molier
Veterinary Surgeon

As pet owners become both increasingly educated about nutrition and willing to invest in premium diets, manufacturers are keen to ensure that nutritionally optimized formulations remain highly palatable – at the same time as they are acknowledging the trend away from UPFs (ultra-processed foods).

Factors in product acceptance

Palatability plays a central role in the success of pet foods and related products. It influences animal intake (and therefore owner satisfaction), as well as overall nutritional efficacy. While enhancers are an important part of the palatability picture, acceptance is influenced by many factors.

Aroma, taste and texture are all key for consistent acceptance of a pet food. It's important to consider species-specific palatability; for example, cats are obligate carnivores, so tend to prefer higher fat and protein levels. Naturally, breed and individual preference play an important role too. Age or illness can increase the importance of palatability, due to declining sensory abilities and dental health.

Emerging trends in palatants

The quality of the ingredients, protein source, fat content, moisture levels, texture and particle size or shape can all influence the end palatability of a pet food. It can also be affected by processing techniques, packaging and storage conditions.

Palatability enhancers were historically classified into fats, proteins and yeast extracts.

More recently, developed palatability enhancers are placing increased emphasis on sustainability and added nutritional value. Examples include plant-based proteins, insect-derived hydrolysates, fermented material and amino-acid nucleotide systems.
Novel palatability enhancers can improve the flavor of a pet food while also promoting a healthy weight, without the addition of fats.

Emerging enhancing agents can be broadly grouped into sustainable, prebiotic-enriched, bio-fermented and neuromodulator palatants.

Exploring sustainable possibilities

Eco-friendly options include plant-based and insect-derived proteins, which are also emerging as popular ingredients in low-allergen or hypoallergenic diets.

A study from a research team at Kasetsart University, Bangkok, published in *Veterinary World* in 2025, looked at cricket protein hydrolysate as a potential sustainable and functional pet food ingredient. The study evaluated palatability, physiological responses of the (pet) consumer, and potential for shelf-life extension (via antioxidant properties) in commercial dog food.

The study concluded that a moderate inclusion of cricket protein hydrolysate (2%) enhanced both the palatability of the diet and its oxidative stability. Interestingly, while a higher inclusion rate improved antioxidant ability, it reduced palatability.

Some serum metabolic markers were also altered at higher inclusion rates. Importantly, cricket protein hydrolysate lacks some essential amino acids, such as tryptophan, making it unsuitable as a sole protein source.

Another 2025 study, led by a Portuguese research team and published in *Translational Animal Science*, addresses the fact that insect hydrolysates have been investigated in vitro, but further studies are needed looking at the effects of dietary inclusion on nutritional and metabolic parameters. The results differed depending on the insect species and enzymes used, but overall showed that black soldier fly and yellow mealworm may offer high protein, plus antioxidant and antihypertensive properties. The insect hydrolysates were palatable at an inclusion rate of 3%.

These were relatively small-scale studies, and more research is needed to assess factors including long-term health benefits, safety, manufacturing processes and optimum inclusion rates.

Bringing in prebiotics

With increasing awareness of the importance of both the microbiome and the gut-brain axis, these palatants aim to combine palatability with improving gut health.

Emerging formulations include mixing prebiotics with more conventional enhancers, thus improving palatability while benefiting the gut microbiome. A healthy gut microbiome contributes to optimum nutrient absorption, digestive function and immune system health.

Using bio-fermentation and yeast

Bio-fermented palatants use microbial fermentation as a sustainable means of producing highly palatable flavor and scent profiles (amino acids, volatile compounds, peptides). They create umami flavors, mimicking a meaty taste.

These are emerging as possible enhancers for novel, less palatable protein source diets. In fact, a 2020 study published in *Heliyon*, led by a research team from the Shanghai Institute of Technology, concluded that the lower palatability of certain mushroom and mealworm derived proteins could be counteracted by the addition of key volatile compounds, improving palatability.

A 2025 pilot study published in *Frontiers in Veterinary Science* concluded that microbial fermented protein sources were palatable, without any adverse effects. More research is needed focusing on potential health advantages or negative effects, alongside the more obvious sustainability benefits.

Enhancing mood through food

Research is also emerging focused on how targeted neuromodulators could enhance palatability, while also influencing pet behavior and/or mood.

A 2025 review of modern palatant strategies in pet food, published in the journal *Foods*, discusses using compounds that activate the neurological pathways involved in mood and wellbeing, such as the serotonin and dopamine systems.

A well-known example would be tryptophan, which is a precursor to serotonin. Supplementing a diet with tryptophan aims to improve the synthesis and availability of serotonin in the body, thereby enhancing mood. The 2025 review hypothesizes that the addition of targeted neuromodulators influencing the dopamine and serotonin systems could provide a positive experience for the pet, uplifting mood beyond the mealtime itself.

Novel palatability enhancers go beyond the functional ingredients, with recent innovations and patents including multilayered coatings, emulsified gravies and flavor profiles specific to life stage.

Future opportunities

Palatability enhancers have the potential to not only increase acceptance of a diet, but also to offer nutritional benefits, improve the sustainability of a product and increase consumer satisfaction. Such additions may be especially important in feline food products, since cats tend to be more selective eaters than dogs.

Potential future hurdles for novel palatants include proving long-term efficacy and safety; and ensuring effectiveness is maintained throughout the manufacturing process and shelf life.

Despite growing market trends in palatability enhancers, more peer-reviewed research is needed on species-specific palatability enhancement, optimal processing, and safe and effective inclusion rates – as well as potential nutritional benefits. ◆

Symrise Pet Food FRANCE

New product unlocks the secret to feline feast appeal

Cats are famously fussy. A new palatant wins them all over.

A cat's preferences are set long before its food reaches the bowl. Studies show that likes and dislikes are both innate – an aversion to bitter tastes, for instance – and acquired, shaped by the mother's feeding experience during gestation and lactation.[1]

Anatomy and appetite

However, satisfying a cat's palate is no easy feat. Cats are notoriously finicky eaters, even more than dogs. Their preferences are based on their distinctive anatomical characteristics and their own previous feeding experiences. Cats' sensory equipment makes moisture, texture and odor crucial parameters for dry cat food palatability.

Because individual cats can exhibit strong personal preferences, the challenge of creating universally appealing cat food is greater still. For pet food manufacturers, achieving high palatability and maximizing acceptance among a broad range of cats is a constant pursuit.

That pursuit is commercial as well as technical. For cat owners, mealtime is more than ensuring their cat meets its nutritional needs, and the joy of seeing a cat enthusiastically devour its food reinforces the choice of brand. Some 72% of pet parents say they would rather cut back on personal expenses than sacrifice the budget dedicated to their pet, so palatability is critical to the success of any cat food.[2]

Reaching peak performance

Symrise Pet Food's expert brand SPF meets this challenge and proudly announces the launch of the highest-performing cat food palatant on the market.

Success was possible thanks to SPF's extensive capabilities and years of intensive research and development. To achieve the highest cat palatability performance, it is not enough to rework existing recipes and assess them in versus-test conditions in a single panel. It requires breakthrough innovation, along with a deep understanding of market specifics and feline feeding behaviors.

The product's efficacy was validated by more than 100 palatability tests carried out in SPF's worldwide network of panels, using a variety of sensory methodologies. It was also evaluated against the best-performing pet food products currently available on the market. Developments were made using SPF's pilot plants and dry pet food pilot production line to ensure performance across various kibble bases.

A versatile powder

SPF created a highly effective powder formulated with a combination of carefully selected protein sources powered by top-notch technologies. The product significantly enhances cat food palatability, making it appealing to all cats regardless of individual preferences. It works across different kibble types, simplifying product development.

With this new product, Symrise Pet Food raises the bar in cat food palatability, aiding manufacturers in achieving greater customer satisfaction and success. ◆

References: [1] Catering to cats' individual preferences, J. Rogues et al. 2018
[2] Pet food expenses, LOOP consumer report, n=2,517 respondents in France, UK, USA, Canada, Brazil, Mexico, 2024

Symrise Pet Food
petfood.symrise.com/spf

Breaking the mold in feline taste testing

In-home trials can capture real-world feeding behavior while incorporating valuable owner observations.

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One scientific study set out to improve the precision and relevance of cat food palatability testing by developing an in-home protocol. The results demonstrate that companies might achieve useful palatability data with just a single test day, saving time and costs while minimizing dropout bias.

Importance of the taste test

Palatability is arguably one of the most important determinants of a pet food's market success, which is why businesses routinely test it. When testing palatability of cat food, however, traditional 'expert panel' settings (e.g. research facilities or kennel-based trials) do not necessarily reflect the real-world diversity of household cats.

Standardized palatability test procedures can improve effectiveness and reliability. Therefore, a 2025 study from Wageningen University & Research (WUR) in the Netherlands, published in *Applied Animal Behaviour Science*, generated data on key protocol aspects to allow reliable in-home determination of cat food palatability.

Nature of the research

To dive into variability across days and between animals, and to investigate the required protocol length and sample size, 62 cats participated in either a one-bowl or two-bowl test. Four commercial dry extruded cat food diets were used, paired to create either a high contrast or a low contrast in palatability (based on differences in ingredient quality, protein and fat content, and level and type of palatability enhancers).

Cats and their owners got familiarized with the test setup during one day prior to the testing period. That time span was either 10 days or 20 days in total, depending on whether the cat was participating in the one-bowl or two-bowl test. Food leftovers were collected by the researchers, and food intake and food intake ratios were determined each day. The owners also shared their behavioral observations.

No adaptation period needed

It was expected that food consumption by cats might fluctuate over time due to neophobia, neophilia or the effect of learning. Surprisingly, however, this study showed – in both the one-bowl and two-bowl test – that no adaptation period was necessary before taking measurements.

In fact, there were no significant differences in the measurements from both the one-bowl test and the two-bowl test during the testing period, regardless of the different foods and food contrasts.

This suggests that the cats were not subject to neophobia or neophilia and were stable in their food intake responses. This could largely be due to the familiarization day prior to the start of the test, as unfamiliar conditions might promote neophobia and deviant food intakes.

Test outcomes on the first day were therefore predictive of the outcomes on the last day of the testing period.

One day of testing suffices

Since the stable food intake and food intake ratios suggested that one day of testing is sufficient for a reliable result, the researchers used bootstrap simulations to model if multiple testing days would increase precision.

The results indicated that adding more test days only slightly increased precision (i.e. reduced variability), and added an extra cost because more cats dropped out over time – typically because they rejected the food. Therefore, a more precise result was less accurate, as the test population became less representative during the test.

Sample size matters more than duration

The effect of sample size was also investigated using bootstrap simulations. The larger the sample size, the higher the precision levels of food intake and food ratio measures.

However, increasing the sample size influences precision more than increasing the number of test days. Therefore, the number of test days and the number of animals cannot be used as a direct trade-off.

Research implications for the industry

This study demonstrates that in-home palatability testing using privately owned cats provides market-relevant insights. The procedure considers real-life variation impacting both animal measures and owner feedback.

To obtain both accurate and precise results, companies should carefully design the test population. Prioritizing a larger, variable population over longer test durations yields more robust palatability data while minimizing dropout bias.

Providing that the test population is representative, this approach can produce efficient, consumer-relevant testing for cat food. For pet industry players, the study shows that it could be possible for them to achieve useful palatability data with just a single test day, saving time and costs. ◆

How does flavor migration shape palatability in wet pet food?

Research shows the impact of adding a palatant to just one part of a chunks-in-gravy recipe.

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In multi-matrix formats such as chunks-in-gravy (CIG), a palatant may be added to either the chunks or the gravy to enhance the taste of that component. However, the effect often extends beyond the targeted matrix, influencing the overall flavor profile.

Understanding flavor distribution

To better understand how palatants influence flavor perception, six wet pet food palatants were evaluated in a CIG cat food model, generating six recipes that differed only in the palatant used. Each of the palatants was included at equal levels and applied only to the gravy portion of the recipes.

Near-infrared (NIR) spectroscopy was used to compare the chunks, gravy and complete CIG products before retort. Since the chunk formulation remained unchanged across all recipes, the chunk samples were compositionally very similar, as expected.

The gravies, however, each contained a different palatant and therefore exhibited clear compositional differences. Analysis of the complete CIG products showed an intermediate profile, reflecting the contribution of both matrices.

Grouped by performance

Following retort, flavor profiles of the gravy, chunks and complete product were analyzed using gas chromatography-mass spectrometry (GC-MS). Feeding trials were then used to classify the palatants according to palatability performance.

OPLS-DA* analysis showed that samples were grouped by palatability performance rather than by matrix. In other words, the characteristic flavor profiles associated with high-performing palatants were present in both the gravy and the chunks, despite the palatants being added only to the gravy. This provides strong evidence that volatile flavor compounds migrate between matrices during processing and/or storage.

Designing beyond the gravy

Although flavor migration between gravy and chunks occurs, the point of addition remains critical. Palatants can influence gel stability, chunk texture and product appearance, meaning their placement has functional as well as sensory implications. A deliberate evaluation of matrix interactions and processing conditions is therefore essential to preserve product structure while optimizing overall palatability. ◆

**An OPLS-DA (Orthogonal Partial Least Squares–Discriminant Analysis) score plot is a statistical visualization used to compare complex chemical profiles (volatile and semi-volatile compounds) between predefined groups (high and lower palatability).*