



PETS International

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OCT 2026

SPOTLIGHT ON ASIA

Analysis and interviews
from across the region

FINDING THE RIGHT FORMULA

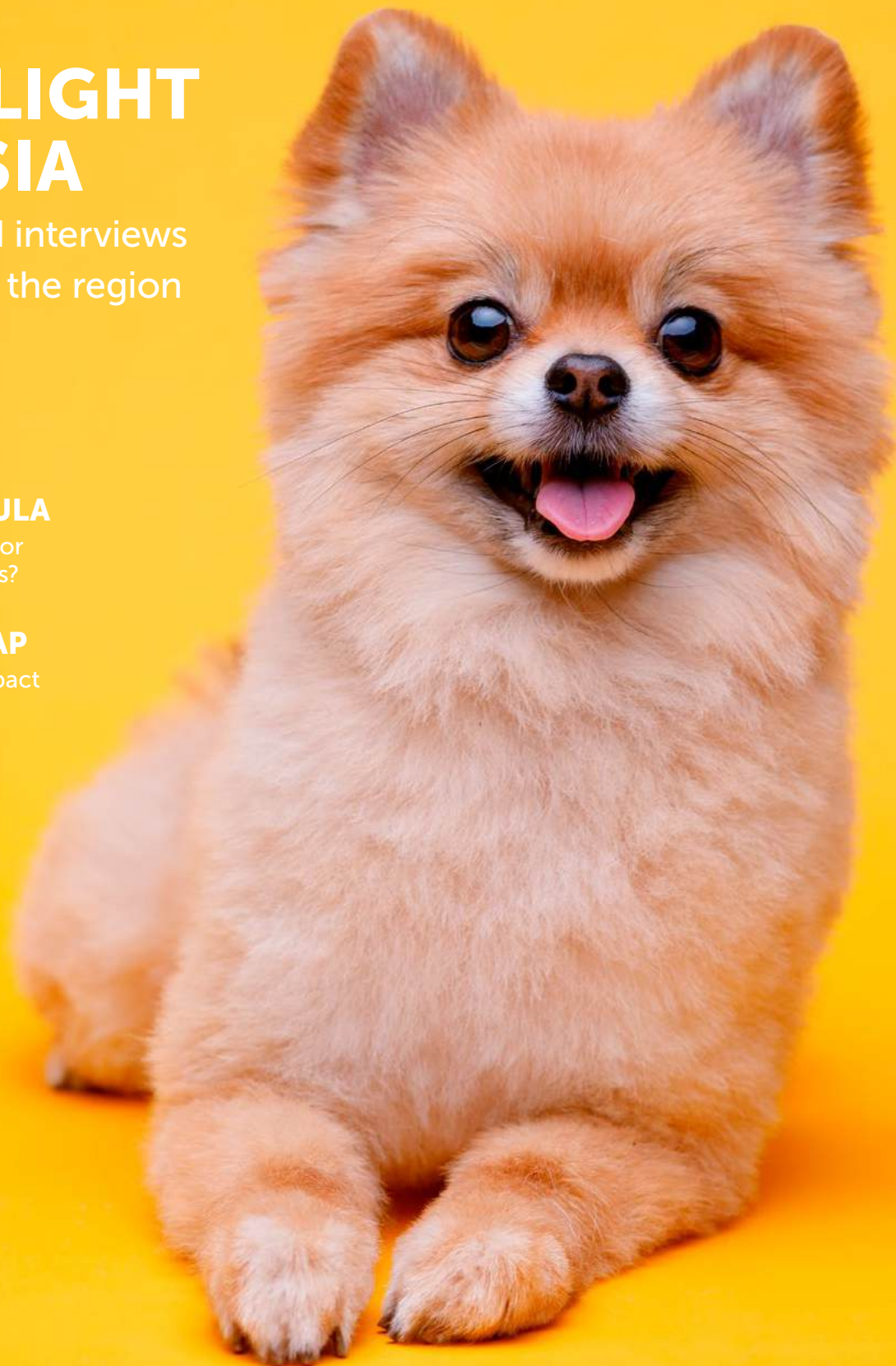
What's in the mix for
alternative proteins?

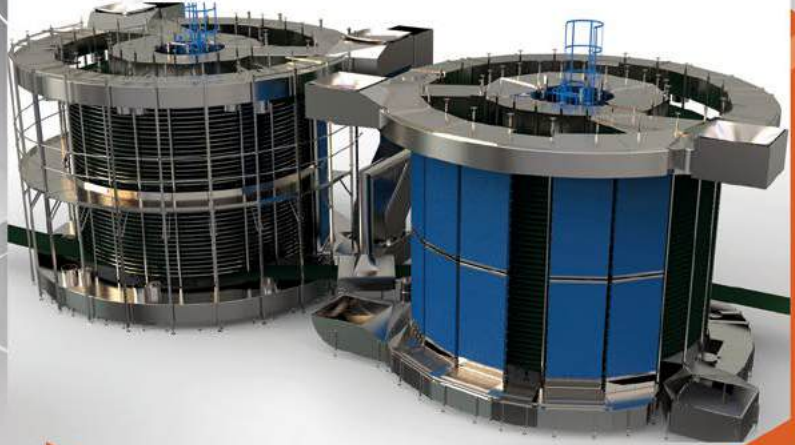
THAT'S A WRAP

Navigating the impact
of the PPWR

WORD OF MOUTH

The online pet
dental market





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*from tradition —
to disruption*

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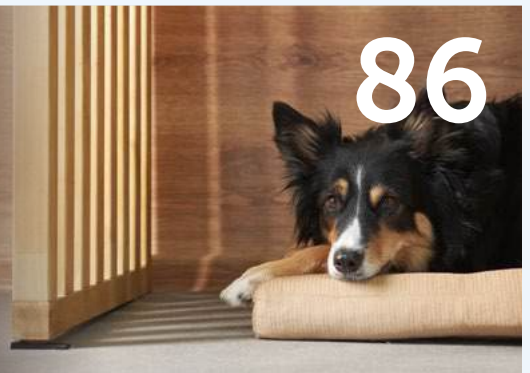
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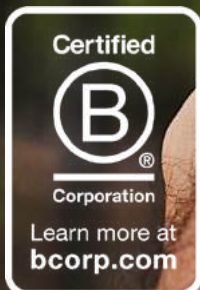
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The Asia equation

When looking at Asia, it is tempting to picture a single wave of growth. But each market has its own characteristics and distinct pet owner behaviors. In this issue, we take a closer look at these local realities.

In China, online shopping continues to shape how consumers buy pet products, while physical stores and veterinary clinics remain important for services and premium offerings. India is seeing an influx of first-time pet parents, creating demand for more comprehensive pet care in-store, as well as integrated healthcare and wellness services.

Further south, Indonesian manufacturers are challenging a market historically dominated by multinationals, while the national government is encouraging them to meet domestic demand and expand into higher-value export markets.

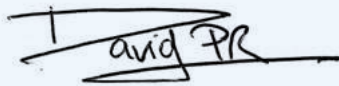
Consumer habits also vary across the region. We explore attitudes to innovation through the eyes of pet owners in Thailand, Japan and

South Korea. Which market is leading the way in technology, and where do owners remain more attached to traditional approaches?

And for those who have not yet registered, I would like to take this opportunity to invite you to the GlobalPETS Forum 2027. We are presenting a program of keynote speakers and sessions exploring major developments in the pet industry, alongside opportunities to exchange ideas and network with fellow business leaders.

Scan the QR code to find out what to expect in Lisbon and secure your spot.

Wishing you an inspiring read.



David Palacios Rubio
Editor-in-Chief



“We cannot direct the wind, but we can adjust the sails.”
DOLLY PARTON, AMERICAN SINGER-SONGWRITER AND BUSINESSWOMAN

 **PETS International**
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Intermedium Publishers BV
Newtonstraat 3
1098GX Amsterdam (NL)

+31-33-4225833
content@pets.nl

Editorial team

Managing Director: Philippe Vanderhoydonck
Editor-in-Chief: David Palacios Rubio
Head of Operations: Lisa van Roon
Senior Editor: Janetta Willis
Editors: Lynn Radford, Mandy Wolters-Savage,
Elizabeth Youens
Design: Hester de Gier

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MENA online pet retail booms as e-commerce options expand

Weekly online shopping is accelerating across the Middle East and North Africa (MENA). According to a report by fintech company checkout.com, online pet care purchases are led by Qatar where 73% of consumers plan to shop online more. Saudi Arabia and the UAE (67% each), Kuwait (62%), Jordan (60%) and Egypt (53%) follow.

Retailers note that digital channels are primarily used for planned, high-volume stock-up orders, such as bulk pet food and cat litter, generating higher average basket sizes.

The rise of integrated buy now, pay later (BNPL) platforms such as Tabby and localized payment gateways has significantly lowered checkout friction and boosted conversion rates.

Additionally, AI adoption is gaining traction: 65% of MENA shoppers are familiar with agentic AI, and half are open to letting AI shop for them.

Pet food joins Ecuador's household essentials basket

Ecuador has included pet food in its Basic Family Consumption Basket (BFCB) for the first time in four decades. The BFCB tracks the monthly cost of vital goods for a four-person household.

The National Institute of Statistics and Censuses expanded the basket from 75 to 98 items to reflect modern habits. Pet food is included under the food and beverages category, with an average monthly allocation of \$14.78 (€12.99).

Meanwhile, the UK's Office for National Statistics (ONS) added 27 items to the Consumer Prices Index (CPI) this year, including pet grooming. Italy added dog waste bags and pet bowls to its CPI basket in 2025.



TikTok Shop broadens footprint across Europe

In June 2026, TikTok Shop launched in Poland, the Netherlands, Belgium and Austria. The platform is now available in 13 European markets, including Portugal, Hungary, Czech Republic and Greece, creating new opportunities for brands and retailers to reach consumers through social commerce.

After launching in Germany in March 2025, TikTok Shop has become the country's 15th-largest retailer in less than a year, according to e-commerce technology company ChannelEngine.

Escalating logistics and growth costs drive up pet sector SG&A expenses

Rising logistics and expansion costs are driving up selling, general and administrative (SG&A) expenses across the pet sector. After interviewing 36 CEOs in the European sector in the first quarter of 2026, management consultants McKinsey found that “cost and margin pressure remained the number one concern” for the fifth consecutive year.

Financial reports globally indicate pet retailers and manufacturers are devoting larger revenue shares to support operations, supply chains and store upgrades. US chain Tractor Supply Company projects expenses of nearly \$10 million (€8.9M) in late 2026 for a new distribution center, while American pet food company Freshpet expects higher logistics costs due to fuel price increases linked to Middle East instability.



VAFO expands health and nutrition portfolio

The Czech manufacturer is enhancing its preventive health portfolio via a strategic investment in Austrian pet health startup Pezz life. Combined with its prior partnership with UK pet gut health company BIOME9, the deal gives VAFO a comprehensive health testing suite. The company plans to scale Pezz life across Europe using its distribution network.

In addition, VAFO has launched its Sam's Field premium pet food range in the UK, advancing its goal to reach €1 billion (\$1.1B) in revenue by 2029.



Digital channels dominate as US pet sales pivot online

NielsenIQ projects US pet care revenue to grow 6% in 2026, driven entirely by e-commerce while physical retail sales contract.

Annual US pet sales reached \$95.1 billion (€85B) for the 52 weeks ending 27 July 2026, with digital channels generating 48% of total revenue.

Online household penetration reached 74.2%, whereas in-store value sales dropped 1.4%.

Nevertheless, brick-and-mortar stores maintained growth in fresh dog food, cat treats and pet medicine. Notably, fresh dog food sales surged 92% year-over-year and smart pet devices jumped 32%, underscoring strong demand for connected care and premium fresh diets.

UK pet parents prioritize quality over price

Half of UK pet owners now look for product quality over price, even as convenience keeps supermarkets dominant in pet retail.

A survey of 1,076 UK consumers by Johnson's Veterinary Products also reveals that local pet store reliance dropped six percentage points, with supermarkets capturing market share.

Packaging transparency is crucial, as 71% of pet owners regularly check ingredient labels before buying, and nearly 80% factor environmental or ethical considerations into purchases. Industry experts advise independent retailers to highlight value messaging and loyalty perks to retain cost-conscious shoppers without compromising on product standards.

Thai pet food exports set for growth amid major expansions

Thailand's total pet food exports grew by 8.15% YoY in 2025, up from \$3 billion (€2.6B) in 2024. The country currently holds a 10.2% share of the global export market, second only to Germany at 12.1%.

Between January and May 2026, Thailand exported pet food worth \$1.4 billion (€1.2B), up 5.1% from the same period the previous year.

Nantapong Chiralerspong, Director General of the Trade Policy and Strategy Office under the Ministry of Commerce, says that processed pet food remains one of Thailand's most successful agricultural exports.

Nestlé Purina has recently announced the expansion of its Thai production facilities to capitalize on growth in the region, while Thai agribusiness Betagro recorded a 25% increase in pet unit sales in 2025.



European retailers back premium pet care concepts

European retailers are introducing dedicated pet care concepts to meet demand for premium pet products.

Carrefour Polska is building on its pet care offering by launching a retail concept that expands its product selection to more than 2,500 products, including nearly 1,000 new items, in a dedicated section. The retailer plans to add new lines, including products from specialty Polish manufacturers.

Belgian pet retailer Tom&Co recently renewed and expanded its para-pharmacy section, offering specialized pet health products ranging from veterinary diets and care products to nutritional supplements.

Global pet sector shows resilience as firms adapt to economic shifts

Financial results across the global pet sector reveal a resilient yet diverging market, with retailers and manufacturers deploying distinct strategies to navigate economic headwinds.

Among pet specialty retailers, Nordic company Musti Group posted 13.8% revenue growth, driven by expansion to 522 stores and the acquisition of ZU. US online retailer Chewy grew 7.3%, adding 208,000 active customers through sponsored ads and vet services, while Canadian retailer Pet Valu and UK chain Pets at Home leveraged loyalty programs to maintain steady sales.

On the manufacturing front, companies delivered solid top-line performance despite inflationary pressures. American natural pet food specialist Freshpet and Thai business i-Tail reported net income increases of 19% and 21.3% respectively, supported by strategic pricing and one-off tariff adjustments.

While dog food volumes experienced softness in some regions, strong demand for cat food and treats helped offset the gap. Overall, the industry is balancing growth-focused expansion with strict margin discipline through price adjustments and channel optimization.



PET INDUSTRY FACT FILE

DATA INSIGHT

10%

of UK pet owners are unaware of how their pet's nutritional needs change with age, according to new research from Pets at Home. Another 9% are unsure when it is time to review their pet's diet.



NEW APPOINTMENTS



Sonae

The Portuguese owner of Musti, Arken Zoo, Pet City and ZU has officially proposed João Dolores as its next CEO.



MicroHarvest

Founders Katelijne Bekers and Jonathan Roberz become co-CEOs at the biotech firm, while Justus Reich has been appointed CFO and Jan-Philipp Birke is now COO.



Mars

Deri Watkins has been appointed interim Global President of Mars Pet Nutrition.

TOP 3 INVESTMENTS

Japanese seafood company **Umios** has taken a 25.1% stake in Thai pet food manufacturer Pataya Food Group (PFG).



US dog grooming franchise **Sparkle Grooming** has secured \$6 million (€5.2M) in strategic growth investment.

Spanish biotech **MOA Foodtech** closed a €3.3 million (\$3.8M) funding round.



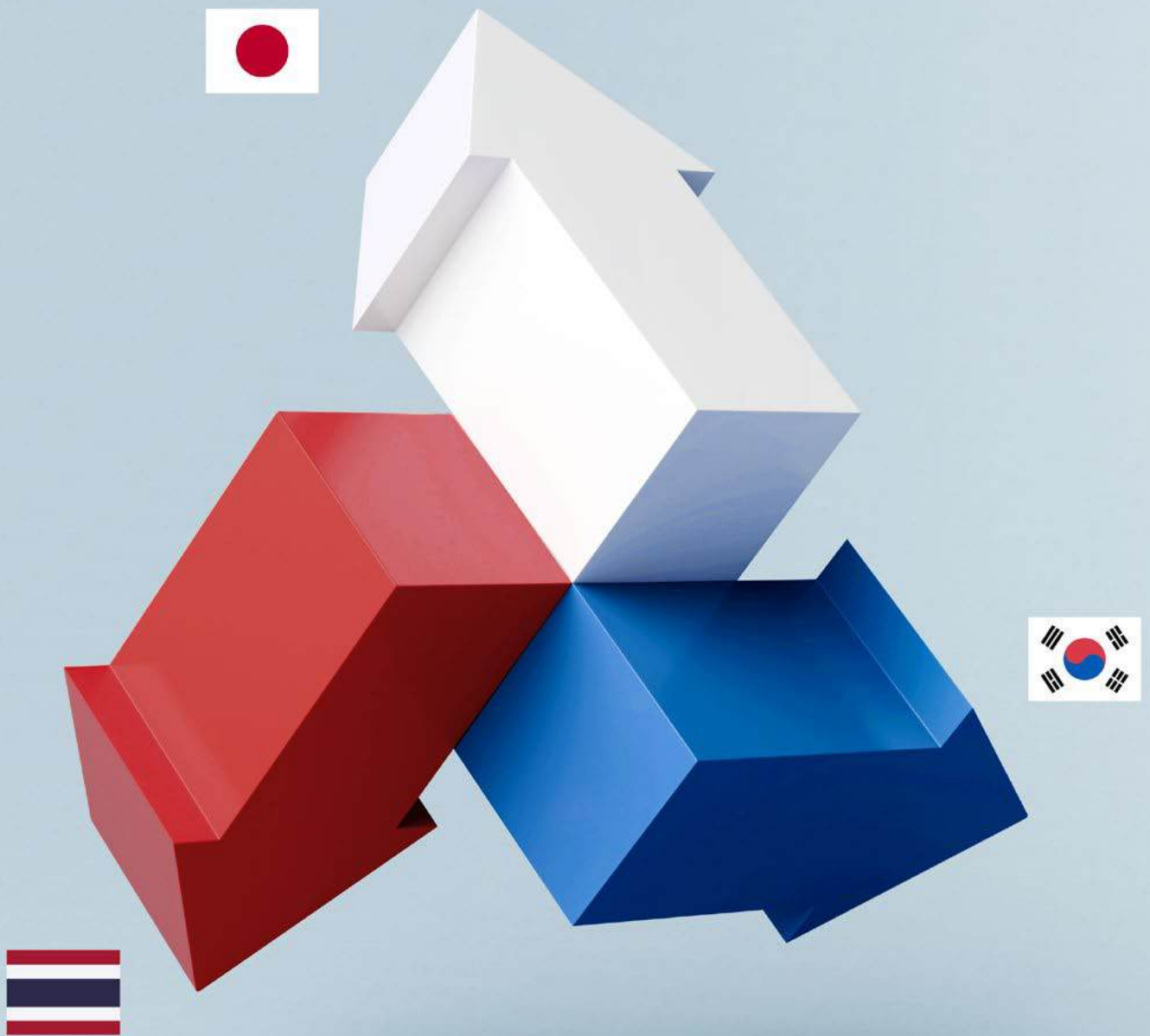
TOP WEB NEWS

Next opportunities for pet industry

Cats, treats and fresh food predicted to be drivers of growth.



LATEST
NEWS



APAC: one region, multiple playbooks

Pet owners in Thailand, South Korea and Japan are adopting technology and services at very different rates, suggesting localized attitudes toward convenience, privacy and care routines.



Thuyen Vu
Chief Marketing Officer
TGM Research

New research reveals the danger of assuming that all Asia-Pacific (APAC) countries are the same. Despite their geographic proximity, these three national markets are at varying levels of maturity when it comes to views on pet care and gadgets.

Distinct market differences

A survey conducted by TGM Research across six countries, including Thailand (769 respondents), South Korea (394) and Japan (239), shows how misleading the umbrella term APAC can be, especially when it comes to consumer realities.

In Thailand, for example, 74% of respondents own a pet, compared with 39% in South Korea and 23% in Japan. And regarding pet-related technology, services and spending, these markets are not merely following the same path at different speeds; they are each moving in their own direction.

In Bangkok, for example, a young dog owner might check her phone before sitting down while dining out. A smart feeder has already dispensed her pet's meal, and a GPS collar confirms that her golden retriever is safe at home.

In Seoul, meanwhile, a cat owner might access his living-room camera to quickly check on his pet while away from home. He feels reassured, though he still wonders where all that footage is being stored. And in Tokyo, a woman cleans her cat's litter tray by hand – not because she has missed the rise of pet technology, but simply because the routine works for her.

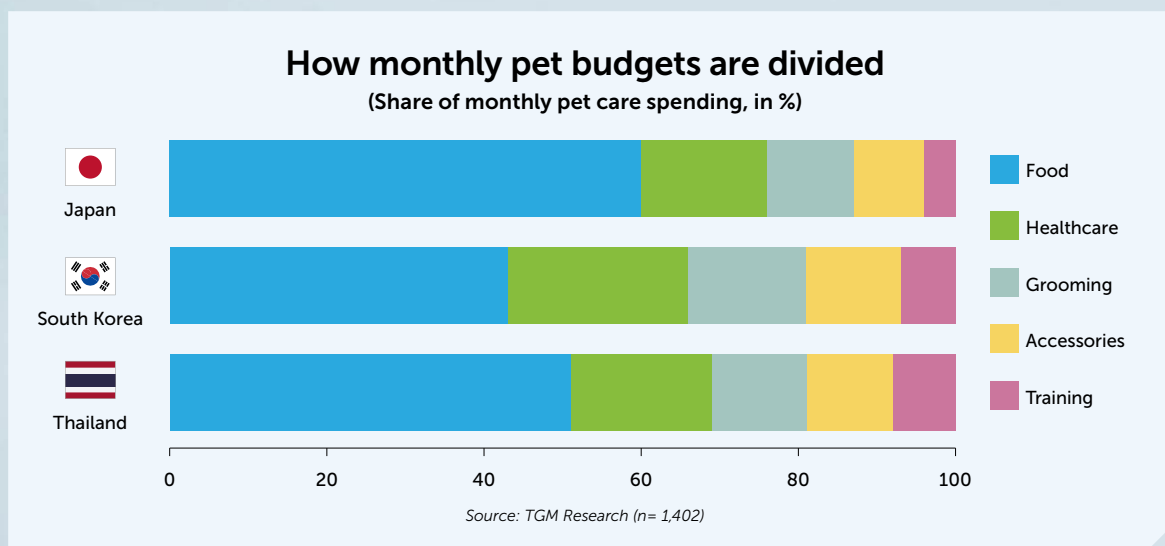
Thailand: technology meets tradition

Thailand provides a good sense of the momentum. Pet ownership is broad, energetic and often young. Many owners are still shaping what pet care means, and technology is being welcomed with open arms.

Thai pet parents lead the three markets in the use of health-monitoring devices (24% of respondents compared with 15% in South Korea and 8% in Japan). They are also ahead on GPS trackers, at 20% – four times Japan's level. Apps that detect health issues from a photo appeal to 41% of respondents, feeders that track eating habits to 40% and activity-monitoring collars to 37%. Only 11% show no interest in any new pet care technologies.

Perhaps surprisingly, the respondents' enthusiasm for technology does not mean leaving tradition behind. The survey reveals Thai owners to be the most likely to refrain from using more tech because they prefer traditional care, and they are also the most likely to

[▶ SEE NEXT PAGE](#)



use or consider natural and herbal remedies. A Thai pet parent can trust a smart collar and still believe in non-tech recommendations received from their family or community.

Old habits are not being replaced with new tools in Thailand. Instead, things are being layered: instinct and data, tradition and tracking, affection and apps.

Korea: connected but not convinced

South Korea tells a different story. If Thai consumers are excited about discovering pet tech, in Korea they have lived with it long enough to become more selective.

Korean pet owners are the most connected in the study. Only 23% use no pet technology at all, compared with 35% in Thailand and 68% in Japan. Video monitoring, used by 29%, and smart feeders, used by 25%, have become part of many households.

Not anti-tech, just experienced

But things change when the conversation turns to the customer experience. Korean pet owners don't only want to know whether a device is smart. They also ask whether it is trustworthy, useful and worth the money. Additionally, they are notably wary about data privacy, with 20% naming it as a barrier to using

more pet technology – nearly three times the level seen in Japan.

That does not make them anti-tech. It makes them experienced users. Where does the camera footage go? Who owns the health data? Is this helping my pet or just adding another subscription?

In Korea, the question is no longer whether owners will spend on their pets. They already do. The harder question is whether a brand can justify its place in a crowded, sophisticated market. To stay in the home, a device needs to prove its value.

Japan: quiet routines, clear boundaries

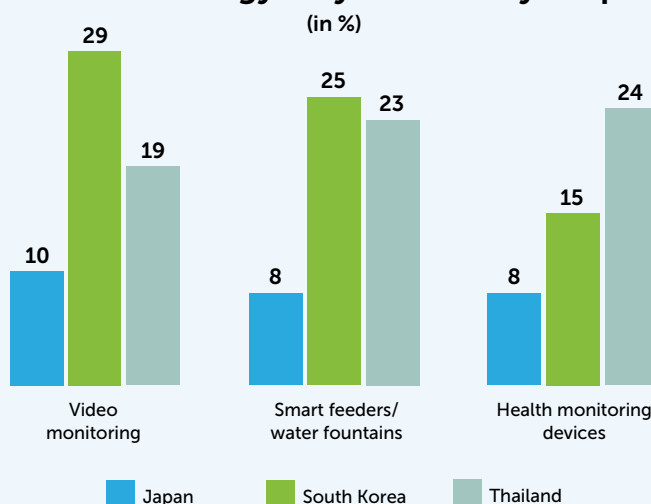
At first glance, consumers' low use of pet gadgets in Japan could look like hesitation. Two-thirds of Japanese owners use no pet tech at all.

But the data suggests something quieter and more deliberate. When Japanese owners are asked what stops them from using more pet technology, only 24% doubt the benefits. The most given answer – at 27% – is disarming: "I already use everything I need".

This is not a market waiting to be converted. Japanese pet parents have considered numerous offerings and



'What technology do you use for your pet?'



Source: TGM Research, (n= 1,402)

A Thai pet parent can trust a smart collar and still believe in non-tech recommendations received from their family or community.

have decided, for now, that life is fine without them. Pet care in Japan is often kept close to home, and built around routine, small acts and personal responsibility.

A product that promises to transform pet care may feel excessive to them. A product that removes one small daily irritation has a much better chance of success. That may explain why the automatic litter box is among the more appealing technologies in Japan. It is practical, discreet and relevant in this cat-led market. It does not ask people to rethink the bond with their pet. It simply makes one part of the routine easier.

Varying opinions on robotic pets

In Thailand, 21% of respondents have already tried or owned one robotic pet, and another 45% are curious. At the other end of the scale, despite Japan being the birthplace of Aibo and Tamagotchi, 64% of Japanese respondents do not entertain the idea. South Korean consumers are somewhere in between.

Perhaps these results are not so surprising. Thai consumers are often newer to pet ownership and more open to different forms of companionship. Japanese consumers seem to have firmer boundaries around what a pet is and, for many, a machine does not fall within that definition.

However, one yet-to-be-invented piece of tech holds similarly strong appeal for consumers across all three countries: an app that can translate what their pet is trying to say, chosen by roughly three in 10 owners. Clearly, no matter the differences between these markets, many pet parents share the same simple human desire: to understand their animal companions a little better.

Divergent views on services and food

Likewise, there are differences between the three markets in terms of pet services and premium care. South Korea is the strongest market for professional grooming and supplements: 36% of respondents

take their pet to a groomer every three to six months, and 45% either use pet supplements or are actively interested in them. These figures put South Korea well ahead of the other two countries.

In Japan, owners' attitudes to pet services echo their limited adoption of pet tech. Half never use grooming, two-thirds never book training, and 80% have used no care or training service – no sitter, no boarding, no trainer – in the past year. On average, Japanese pet parents spend just 11% on grooming services. This is similar to the figure for Thailand, where grooming services account for 12% of the average monthly pet budget.

When it comes to feeding, Japanese owners spend 59% of their monthly pet budget on food, suggesting care that is simple, essential and largely kept in-house. In South Korea, pet spending is more evenly balanced, with food at 43% and healthcare accounting for 23%. Thai pet parents spread their spending even more widely, with a larger share (8%) going on training than in the other two countries. This can be seen as a sign of consumer willingness to invest in living well with pets.

Separate strategies for APAC countries

The lesson for the industry is clear: do not apply a single pet strategy for the whole of APAC. In Thailand, the advice is to lead with innovation, health tools and services, but not to dismiss tradition. The winning offer may be the one that lets old and new sit comfortably together.

In South Korea, meanwhile, it is important to earn trust before asking for loyalty. Quality, transparency, privacy and proof of value matter in a market that has already seen plenty of options. And in Japan, pet industry players should respect the routine. Products need to fit quietly into a self-reliant, cat-led, multi-pet ownership model of care. The best ones will feel less like disruption and more like relief.

Pet humanization is spreading across Asia-Pacific, but not as one steady wave. As shown by the study, these three tides are shaped by different histories, habits and expectations. The brands that win will be those that stop searching for a one-size-fits-all APAC approach – and start writing a specific strategy for each market. ♦

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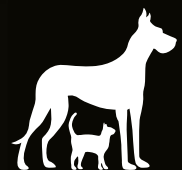
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Saurabh Jain, CEO, Zigly Pet Care

“We want to give pet parents certainty, not just convenience”

The Indian retailer is expanding beyond products as services reach 65% of revenues and it scales up health and veterinary offerings.



David Palacios Rubio
Editor-in-Chief
GlobalPETS

India's pet care market is still largely served by neighborhood pet shops, alongside more organized retail and a growing e-commerce sector. Zigly Pet Care is taking a different approach, combining products with veterinary care, grooming and digital services within a single model.

Founded five years ago as a product-led retailer, the New Delhi-based company operates close to 50 centers across 19 Indian cities. While starting as a pure retailer, it has evolved into a broader pet care ecosystem. CEO Saurabh Jain shares with PETS International how Zigly Pet Care is adapting its business model to respond to the needs of India's growing base of first-time pet parents.

Where does the average Indian pet parent buy food and pet supplies?

In India, the pet care industry is at least a couple of decades behind some developed countries. Having pets at home is still a fairly new phenomenon.

India is a large geography, but shopping and commerce typically rely on small pet shops. These are neighborhood pet shops catering to an area of a maximum of two to three miles, and most regular needs are handled through these stores.

Historically, this has also been the case for other FMCG categories. Today, however, that trend is changing very quickly. In India, we saw this happening in regular consumer industries, where these small shops, known as general trade, shifted toward larger superstores, or modern trade, followed by the last leg: e-commerce.

[▶ SEE NEXT PAGE](#)

We saw that shift to modern trade for regular FMCG categories perhaps 10 to 15 years ago, and the e-commerce wave has been very strong over the last seven to 10 years. We are now seeing the same evolution in pet care.

Today, the market is still largely driven by general trade – mom-and-pop neighborhood pet shops – but some of these are now being converted into more organized chains. In parallel, the e-commerce wave is getting very strong, and customers are now relying on all three channels.

What role is Zigly Pet Care playing in this ecosystem and the broader retail landscape?

When we started out five years ago, we were a product-led retailer. We also had grooming and experience centers within our format, while veterinary care was part of our offering, allowing any pet parent looking for healthcare-related advice to consult our in-house vet.

We have now transitioned from that starting point. Today, we don't think of ourselves as a retailer that simply added some services on the side.

Zigly Pet Care has been built on the idea that pet parents don't think in channels. They don't think about products, veterinary care, grooming, nutritional guidance and digital convenience separately. We believe in an omnichannel thesis and an integrated ecosystem, rather than simply a chain of stores.

Today, Zigly Pet Care has close to 50 centers across 19 cities in India, offering end-to-end care focused on health and wellness, while addressing all the needs of a pet parent, including products.

Within veterinary care, we offer consultations, diagnostics, hospitals and surgeries. We also have grooming spas and a section dedicated to products, where we can consult with pet parents and guide them on what best suits their pets depending on their individual needs.

What's the split between the retail and services sides?

When we started out, retail accounted for around 75% to 80% of our revenue. Today, it represents 35%,

"Almost 70% of pet parents in India are first-time pet parents. They are informed but not very confident, and they are cautious."

while veterinary care and grooming make up the remaining 65%.

Having said that, this doesn't mean that products have declined. Zigly Pet Care has continued to grow significantly, and products have grown as well. However, our focus on vet care, services and health has increased significantly, leading to higher growth in those segments.

How many SKUs do you have for products compared with when you opened?

We follow a product assortment strategy where we review our assortment on a quarterly basis. To begin with, because we did not have any trend lines or patterns, we went with market trends and kept a larger assortment. At that point in time, we may have had close to 2,500 SKUs.

Over a period of time, we realized what our pet parents need, and we noticed that needs were slightly different from region to region. Based on our patterns, we have now rationalized the assortment we keep, and today it is close to 5,000 SKUs.

Which categories are working best?

As an overall category, cats are growing faster – whether it is food, litter or accessories. Most things related to cats where there is a repeat purchase are increasing and growing fast.

Cats used to account for less than 5% of our total share. Within a span of 12 months, that has increased to 15% to 20%. I see cats eventually becoming 25% to 30% over the midterm. We are focusing a lot on cats, and we are about to launch a few cat-specific products under our own private label.

The second trend I see is in health-focused, nutritional food. Zigly Pet Care customers are much more health-oriented, so we see prescription food – whether recommended by vets, specific to certain ailments or having medicinal benefits – increasing very well for us.



What about novel proteins such as plant or insect-based, or cultivated meat?

There is a trend toward different variants of dog food. At Zigly Pet Care, we don't see as much demand for insect-based food, but vegetarian and other non-meat variants are picking up.

This also has a regional nuance. India has a large population in certain regions that are non-meat eaters, often for religious reasons. In those geographies, we see higher demand for vegetarian or vegan meals for dogs compared to other regions.

Where do you want to position Zigly Pet Care? Are you targeting the mainstream market or are you tapping more into high-expenditure pet parents?

Let me help define the customer first. If we look at the numbers, in 2019 or 2020, there were close to 10 million household pets in India. Today, that number is around 40 million, and we reached that before 2024. In just four to five years, the pet population multiplied by four.

This means almost 70% of pet parents in India are first-time pet parents. They are informed but not very confident, and they are cautious. A lot of them are Gen Zs and millennials who are digitally savvy, do their research, and are proactive about vaccinations and grooming. However, they are unsure of themselves, feel lonely in this journey and feel guilty that they aren't doing enough because they lack real people advising them.

A lot of brands focus on what to buy, but they don't explain why it matters. That is where Zigly Pet Care comes into the picture. Our ideal customer needs to see the value in what we offer.

We are definitely not at the bottom of the pyramid in terms of price or offerings, but we appeal to people who have the means to spend and want to understand the 'why'.

What about accessories and lifestyle products like beds, crates and cushions?

These are some of the fastest-growing categories for Zigly Pet Care. We have our own private label, and the first set of offerings we started under that label was around lifestyle. We see that category growing phenomenally well.

We also have a private label called Catmos for cat-related products like litter and training pads.

It has to do with the humanization of pets. People are buying beds, loungers, clothes, comforters and accessories. During the festive season, pets are getting the same attention as humans. The overall lifestyle and toy category is also encouraged by human clothing and lifestyle brands entering pet care. It is a growing category in India and definitely for Zigly Pet Care.

What's the price difference between your private labels and traditional brands?

Taking dry food as an example, and using rupees per kilogram as the benchmark, brands like Drools or Mars Pedigree are priced between ₹200 (€1.82/\$2.09) and ₹300 (€2.73/\$3.13) per kilo. Big premium brands like Royal Canin or Acana are priced between ₹900 (€8.21/\$9.41) and ₹1,200 (€10.95/\$12.55) per kilo. Our brand sits in the middle or just below the premium price range, somewhere between ₹650 (€5.93/\$6.80) and ₹700 (€6.38/\$7.32) per kilo.

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Where Quality Takes Root

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“We are definitely not at the bottom of the pyramid in terms of price or offerings, but we appeal to people who have the means to spend and want to understand the ‘why’.”

We focus on nutritional value, which is much higher than you find in basic brands and equivalent to premium brands. Our food is oven-baked, not extruded, which helps preserve the nutritional value. Because the product's cost is higher for us, the price point translates to being higher than the starting range in India.

What percentage of Zigly Pet Care's product assortment is its private label and what is your target?

Today, private labels make up around 25% of our assortment. We continue to offer and launch private label products. Over the past couple of months, we've launched toys, beds and cat accessories.

From a future perspective, we are getting into hygiene categories with a new variant of training pads. We plan to get into cat food and tissues. For lifestyle, we are launching our winter collection in November. On an active basis, we continue to look for private label opportunities, and that assortment will continue to increase.

This August, you launched a new integrated pet center with at-home vet visits and pickup and drop-off services. Can you explain this new model and tell us if you plan to roll it out further?

At Zigly Pet Care, we are prioritizing convenience. The first layer starts with trust, and once that is built, we prioritize what the customer is looking for. Today, our pet parents need expertise alongside a lot of convenience.

With that in mind, we started 'vet at home' in a few postal codes, where an expert vet visits the pet at home if it is too sick or afraid to travel. We also offer to pick up pets from home, bring them to our center for grooming or vet care, and return them.

This service is currently limited to certain postal codes, and based on the feedback we receive, we will expand it to other geographies.

From a new launch perspective, we are also rolling out our e-pharmacy. You can order medicines online and attach a doctor's prescription or, if you don't have one, you can speak to a Zigly Pet Care vet who will prescribe the right medicine and help you order it for home delivery. We have done a soft launch, and it has recently fully launched nationwide.

You launched your first-ever dog day boarding service in July in New Delhi. How is this working, and do you plan to expand it to other locations?

Yes, we will expand this service to a few centers in selected geographies to begin with and, based on the response, we can expand further.

Pet health is also becoming a priority for you.

What else is in the pipeline?

The biggest issue for pet parents is uncertainty regarding health expenses. Since 70% of them are first-time pet parents, we are trying to build certainty into their lives.

We are going to launch a comprehensive health package, which isn't public yet, that will cover the entire vaccination schedule, doctor consultations, deworming and any seasonal health interventions at a fixed price. It will also cover a few nights of inpatient department (IPD) stays if a pet needs to be admitted to the hospital.

How does it differ from traditional pet insurance?

Insurance doesn't cover vaccinations, so it is not insurance. It covers the predictable things that happen in your pet parenting journey. Instead of a pet parent having to set their own reminders, figure out where to go and deal with increasing prices, we tell them not to worry. You pay a fixed monthly fee, and we take care of all health-related needs for the entire year. This will be launched very soon.

Do you have competition in this, or are you pioneering the concept?

In India, healthcare is very fragmented, and there are hardly any large health chains. Most health aspects are addressed by neighborhood vets running small clinics. While some doctors might have local packages, we have not come across any comprehensive India-wide packages.

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If a pet parent moves to a new city, they can visit the local Zigly Pet Care center to continue their vaccinations or use their IPD benefits in an emergency across India. That is the convenience, scale and certainty we bring to pet parents' lives.

In terms of expansion, are you still targeting up to 65 centers by next year?

Our target is to be close to 60 centers by the end of this financial year (March 2027). Long-term, we see Zigly Pet Care having close to 200 centers over the next four to five years.

We are moving confidently on a path to easily achieve that scale, given the low penetration of healthcare services in India. Fortunately, pet parents are becoming more aware of the need for hygiene, expert vets and proactive care rather than just reacting to issues as they arise.

What role will emerging urban markets play in your expansion strategy over the next years?

We are already present in Tier 2 and Tier 3 markets. I don't see them as smaller versions of Tier 1 markets;

they are a completely different opportunity. People there have spending power but seek value, so you need to explain why they need what you offer.

Almost 30% to 35% of our centers are in Tier 2 and Tier 3 cities, and they are doing very well. Our strategy is to go deeper into the cities where we are already present, and we will probably add three to four more cities to our expansion map over the next 15 to 24 months.

Which areas of the country where Zigly Pet Care is not yet present do you think offer the most potential for expansion?

The northeast is one area where we are not present, and we haven't planned to be there very soon. The market is expanding, but from a logistics point of view, it is a bit cut off, and you need a properly managed supply chain to operate there.

We already see a lot of opportunities in the cities where we are present, which is why we are not prioritizing new regions initially. We are keeping an eye on some fast-growing Tier 2 and Tier 3 cities and will decide the timing based on market evolution.

It's more organically possible to open another center in a city where your brand is already known compared to starting fresh with just one in a completely new city.

What are your priorities for the next 12 to 24 months?

From a process and model point of view, we will stay focused on vet care, health and wellness. I see our share of revenues from services increasing from 65% to probably 70%. Another leg of expansion for us is acquisitions. We acquired two hospitals last year and will continue to acquire more clinics and hospitals.

Our second major focus area is creating a seamless online and offline experience. We sell products on our website, on e-commerce platforms like Amazon and Flipkart, and through q-commerce. We will continue to invest in these channels.

Technology will play a strong role in ensuring the customer experience is seamless – whether it's looking up health records, receiving vaccination reminders, tracking product purchases or managing appointments. ♦



Brisk growth in a pet care hotspot



The industry is a hive of activity as analysts report increases in cat and dog households, plus a steadily rising demand for quality products and services.



Diana Dominguez
Business Reporter
GlobalPETS

Pet food manufacturers, healthcare providers and retail players are expanding capacity and distribution as the Indian market continues to mature. Consumers are increasingly benefiting from innovations ranging from new product formats to enhanced wellness offerings and upgraded digital platforms.

Retail sales projections

The ongoing changes in both consumer lifestyles and the retail sector in India, as well as the vast size of the country's market, explain the differences in the sales data recorded in recent years and a marked divergence in forecasts and projections for the future.

The India Brand Equity Foundation (IBEF), a trust established by the Ministry of Commerce and Industry, reports a total pet care market value of \$3.6 billion (€3.2B) for 2024, estimating a CAGR of 20% up to 2032. However, management consulting firm IMARC Group data gives a figure of \$2.4 billion (€2.1B) for 2024, and forecasts a market worth \$4.6 billion (€4.1B) by 2033. Cognitive Market Research is even more optimistic for the future, predicting \$8.4 billion (€7.4B) for 2034.

IBEF attributes the growth to accelerated urbanization, rising concerns about pet health, and increased consumer spending on veterinary and grooming services as well as on quality pet food.

Data from market research firm Euromonitor International ranks India as the 29th largest market

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This year, India and the EU concluded a free trade agreement, which significantly expands market access between the two economies.

for retail pet food sales. Its market size reached \$759.8 million (€675.0M) in 2025 and is expected to increase to \$850.3 million (€755.9M) this year.

Trends in nutrition

Historically, India's pet food segment was dominated by home-cooked food and table scraps. But the country's Ministry of Food Processing Industries (MoFPI) reports in its most recent pet food sector profile that "increasing health consciousness among pet owners, the rise of vet-prescribed diets, and growing awareness of nutritional needs have led to greater demand for scientifically developed, processed pet foods".

The market is also expanding due to rising pet adoption, especially in urban households, according to IMARC Group. In a report on the pet food market in India, published in September 2026, it says: "Inflating disposable incomes allow pet parents to spend more on specialized, premium food products. Wider product availability through online and offline channels is further encouraging demand."

Supportive government policies have created a conducive environment for growth. Although there are no pet food specific schemes at present, broader initiatives under the MoFPI are contributing significantly to infrastructural improvements and entrepreneurial growth in the sector.

Sustained investment

Investment has continued to flow into the country's pet care market this year, funding nutrition, health, services, retail and technology. Both startups and established firms are benefiting from these capital injections. Several of them are in the pet food sector.

Mumbai-based pet food company Lickicious, for example, recently secured \$2 million (€1.7M) through a combination of equity and institutional debt. The capital will support production capacity, product development, staffing and systems, plus expansion into new categories, formats and sales channels.

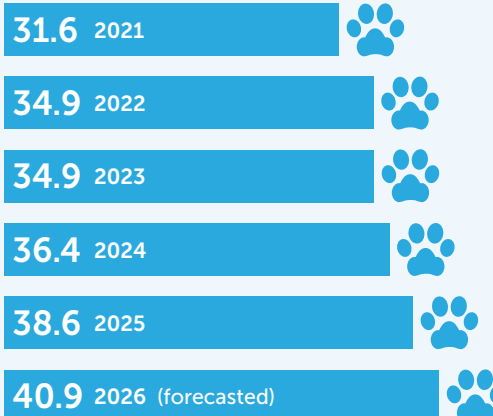
Earlier this year, pet food startup Zoomies raised \$521,000 (€459,000) in pre-seed funding to strengthen its manufacturing and supply chain capabilities, scale brand-building initiatives and expand distribution through q-commerce platforms. Pet nutrition company Benny's Bowl, meanwhile, closed a \$1.4 million (€1.2M) funding round to invest in product innovation and research and development. It plans to launch new product lines and build its online and offline distribution across Delhi, Bengaluru and Mumbai.

In April, pet food brand Drools injected \$19.5 million (€17.2M) into expanding into the fresh pet food category. The move includes the launch of Tetra Pak retort packaging (a multi-layered metal-plastic laminate) to appeal to modern retail sensibilities. Drools CEO Shashank Sinha tells PETS International that fresh food is expected to account for 8-10% of the company's total sales within the next one to two years.

Securing funds to expand

Healthcare has also been given a boost. Delhi-based pet health startup Vetic raised \$40 million (€35.2M) to expand its clinic network and veterinary team, with the aim of doubling its current capacity. The company says the funding will also support vet-at-home services, pet insurance and wellness plans, alongside investments in AI and other technology.

Pet population in India (in million)



Source: Euromonitor International



Additionally, pet care firm Supertails received \$30 million (€26.4M) to strengthen its physical services, digital platforms and fulfillment infrastructure.

Scooby's Club, a pet care company focused on premium neighborhood dog-care hubs, secured \$250,000 (€217,500) in pre-seed funding led by TDV Partners to build a network of hubs, starting in Bengaluru.

In retail and commerce, Indian pet retailer Heads Up For Tails closed a \$25 million (€22M) Series B round, bringing its total capital raised to \$40 million (€35.2M). The proceeds will support its expansion across Asia, with a particular focus on the Middle East.

Q-commerce platform FirstClub secured \$55 million (€48.6M) in Series B funding to expand into new cities, add categories including pet care, beauty and home, and strengthen its technology and supply chain capabilities.

And pet-tech platform Swoofi closed an angel funding round to develop its pet care and stray rescue platform.

Latest market entries

India's pet market is also attracting new players. One of these is Wipro Consumer Care & Lighting, a Bengaluru-based fast-moving consumer goods company, which entered the pet food sector in August with the launch of its own brand Snuggles.

The initial range features a kibble and freeze-dried chicken format made with ingredients formulated with veterinary input. Its portfolio currently comprises three variants, targeting different life stages and breed sizes. These will be sold through specialty pet retailers, veterinary clinics, physical retail stores, e-commerce and q-commerce platforms.

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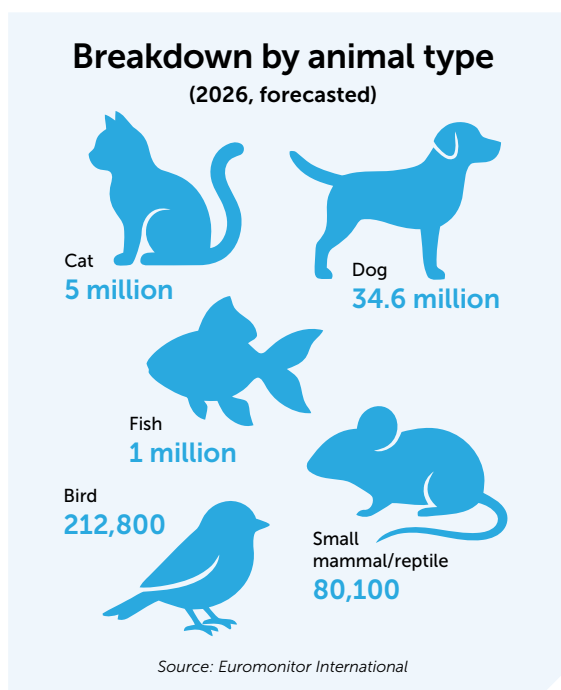


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Mumbai-based Fredun Pharmaceuticals has entered the pet wellness sector with the acquisition of Furlicks, which offers oral-strip solutions for pets. Fredun Medhora, the company's Managing Director and Chief Financial Officer, says that Furlicks' innovation and consumer-first approach will complement Fredun's manufacturing and scale capabilities.

Positive financial outlook

In 2025, imports of pet food into the country amounted to \$135.9 million (€119.8M), up 16.2% annually from \$64 million (€56.4M) in 2020, according to data from the Global Trade Tracker. Exports last year totaled \$77.6 million (€68.4M), resulting in a trade deficit of \$58.3 million (€51.4M) as domestic demand continues to outpace local production capacity, particularly in premium and expanding segments.

The country is, in general, on a positive financial course. Between 2022 and 2025, India's real GDP growth reached a historical high of 7.7%, outpacing other major economies, including China, according to the International Monetary Fund's World Economic Outlook.

Economic expansion is expected to continue. The World Bank Group, an international intergovernmental

financial organization, still forecasts 6.6% growth in India's economy in 2027 – despite higher energy prices resulting from the Middle East conflict and supply chain disruptions weighing on economic activity. The result is that India remains among the fastest-growing major economies in the world.

Relaxed trade rules

The Indian government has taken significant trade measures to support the internationalization and modernization of its economy. Earlier this year, India and the EU concluded a free trade agreement, which significantly expands market access between the two economies.

Under the agreement, tariffs on 96.6% of EU exports to India will be eliminated or reduced over a six-year period, with the measures expected to double EU goods exports to the country. Pet food tariffs, which currently reach as high as 50%, will be phased out under the deal.

Routes to global success

Another boost to business is that the Indian government has relaxed its foreign direct investment rules. This will allow foreign-funded e-commerce companies to use an inventory-based model when they export any goods manufactured or produced in the country. Under the revised framework, these companies can procure and hold Indian-made products against confirmed orders from overseas customers.

Issued by the Directorate General of Foreign Trade on 5 August 2026, the change is aimed at helping Indian manufacturers, traders and micro, small and medium-sized enterprises to access global e-commerce markets.

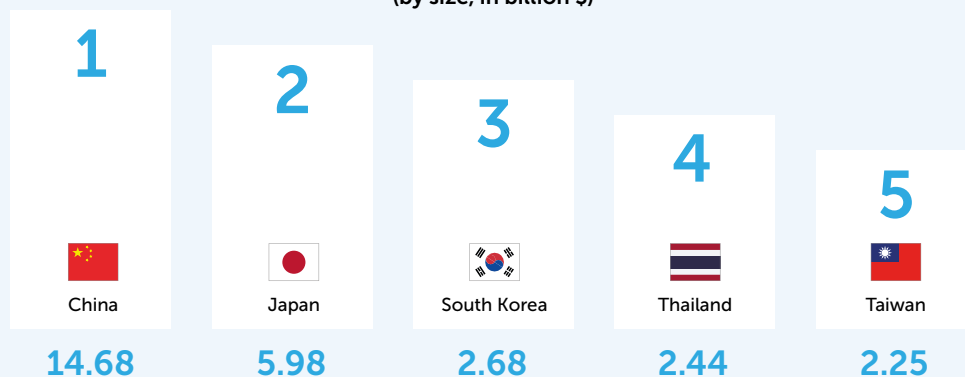
With investment and growth spreading across various segments, India's pet care market remains a key hub for both domestic and international companies looking to establish or scale their presence. ♦

Between 2022 and 2025, India's real GDP growth reached a historical high of 7.7%, outpacing other major economies, including China.

APAC pet industry at a glance

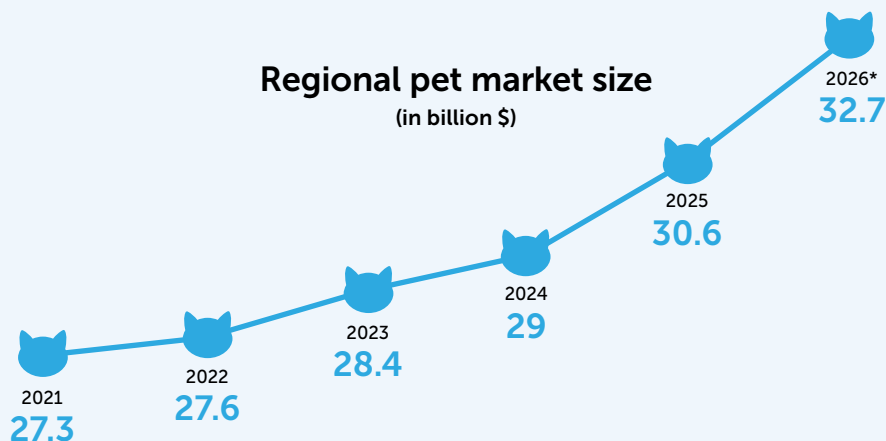
Top 5 pet care markets in 2026*

(by size, in billion \$)



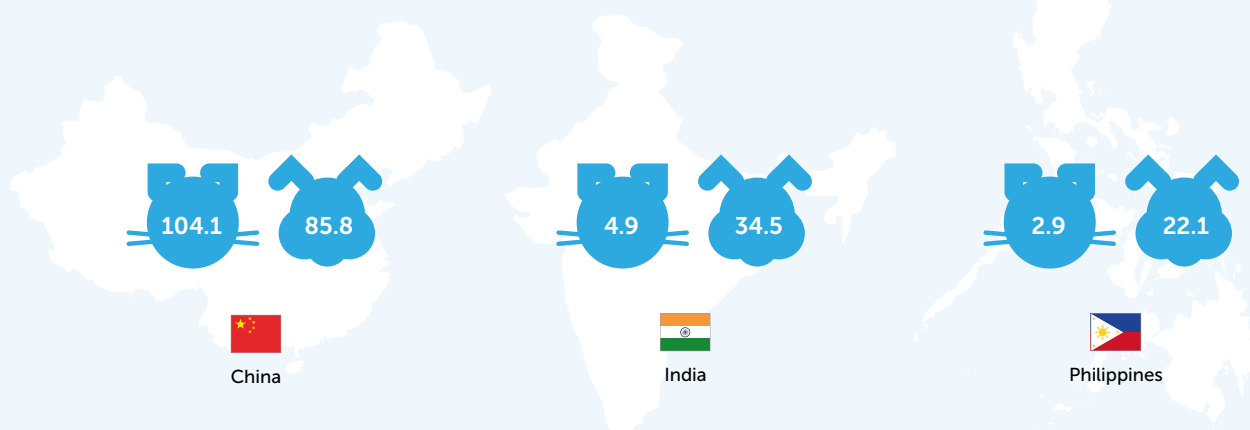
Regional pet market size

(in billion \$)



APAC countries with the largest cat and dog populations

(in million)



*forecasted

Source: Euromonitor International



Country report: Indonesia

Pet food players raise their ambitions both at home and abroad

Local manufacturers are not only intensifying their domestic efforts, further fragmenting the market, but are also looking further afield.



Yunindita Prasidya
Contributor
PETS International

After years of multinationals dominating Indonesia's pet food scene, regional brands are growing more ambitious, aiming to secure a share of both the home and export markets. That ambition is being strengthened by a rising demand for premium products, access to venture capital and government stimulation of local companies to become more competitive.

Government encouragement

With the world's fourth largest population at 285.7 million and with GDP growth of 5.1% in 2025, Indonesia has a strong economic base for developing its pet industry.

In 2024, imports of dog and cat food in Indonesia were valued at \$172.1 million (€153.5M) with a volume of 98.85 million kg, according to data provided by the Trade Ministry. By 2025, this had fallen to \$110.7 million (€96.4M) and a net weight of 59.12 million kg.

Nevertheless, the size of imports remains high relative to exports. For the country's Trade Ministry, this reflects strong domestic demand and creates interesting opportunities for local producers.

To support the nation's economic growth, the Ministry recently urged pet industry players to continue to develop. "The domestic market for pet food is very large, and we encourage local producers to enter this market more optimally," said Indonesia's Trade Minister Budi Santoso at the 2026 Indonesia International Pet Expo (IPE), held in September.

Countries of origin

In 2025, the top three origin countries of dog or cat food imported to Indonesia were Thailand, France and China, according to Statistics Indonesia.

Previously, US manufacturers had a greater share of the market. A 2025 United States Department of Agriculture (USDA) report on the Indonesian pet food market notes that imports of US animal feed (including pet food) declined by 70% to \$44 million (€38M) from 2011 to

2024, despite growing local demand. Thailand has also benefited from preferential tariffs, reduced prices and shorter lead times, the report notes.

Multinational brands have long dominated Indonesia's pet nutrition market. In the cat food segment, the top three companies account for over 50% of the share, according to Euromonitor International. Central Proteina Prima leads the market with a 25% share, followed by Perfect Companion Indonesia at 23% and Royal Canin Indonesia at 9%.

The first two companies are part of the Thai-based Charoen Pokphand Group. Central Proteina Prima is also the biggest player in the dog food category, with an 18% share, followed by Mars Food Indonesia at 15%.

Today, the market is becoming more fragmented, with new brands emerging. The newcomers – both local and foreign players, the latter being most notably Chinese – are growing on the back of e-commerce sales, supported by the rise of online shopping among Indonesian consumers.

Increasing sales and ranges

One Indonesian pet nutrition company that has witnessed strong growth in recent years is Compawpanion, which positions itself in the premium segment. Co-founder and CEO Stephani Herman tells PETS International that sales have increased by seven to eight times since 2023, when the business raised an undisclosed amount in a funding round.

Over the past three years, Compawpanion has expanded its product range from 40 SKUs to more than 100. The current portfolio includes Pawmeals (a cooked food range for dogs and cats covering different life stages and specific dietary needs) and cat food brand Catto.

The company reports customer retention rates of around 50% for Catto and 80% for Pawmeals, and has plans to launch another brand this year. Today, about 60% of Compawpanion sales come from the online channel. This is in sharp contrast with the broader market, where offline channels still dominate.

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Cutey

Happiness begins in her bowl

The advertisement displays a variety of Cutey cat food products. On the left, there are three cans of 'SIMPLE SERVE WITH REAL CHICKEN AND TURKEY IN GRAVY', 'TENDER WITH REAL TUNA AND WHOLE SHRIMP IN GRAVY', and 'SAVORY WITH REAL CHICKEN BREAST IN GRAVY'. In the center, there are three pouches of 'Pate with Chicken and Mince', 'Pate with Tuna', and 'Pate with Chicken and Mince'. To the right, there are several bags of 'WHITE MEAT TUNA' and 'WHITE MEAT TUNA' in different sizes. A blue bowl of cat food is also shown. The background is a light green field with a white fence and a blue sky.

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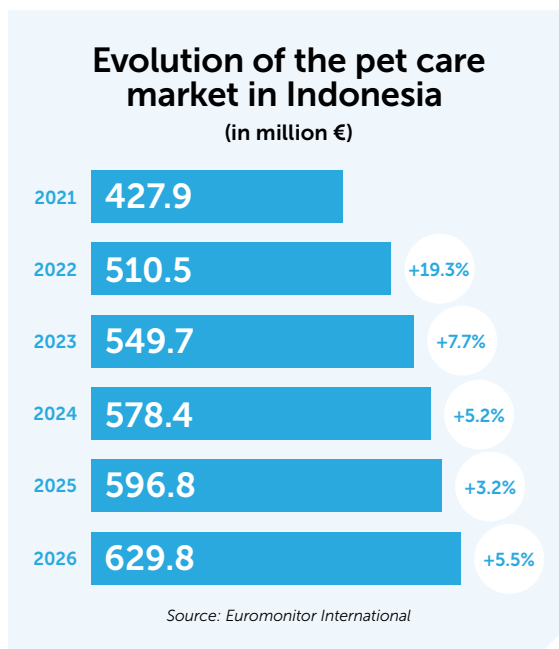
Premiumization potential

Ridarrahim Nirwandar, Country Manager Indonesia at Japanese pet food and treat company Inaba Foods, sees further potential for premiumization in the Indonesian market. Before joining Inaba, he spent around eight years as head of Royal Canin in Indonesia.

"When Royal Canin entered Indonesia, it really helped boost the category in terms of being able to help convert a lot of animals from eating table scraps into eating manufactured food. That's the ambition I see with Inaba," he says.

The rise of premium brands makes sense in view of the growing consumer demand for high-quality products and producers' own push to grow the segment.

Whereas treats make up an estimated 25% of the pet food category in Japan, that segment only accounts for about 2-3% in Indonesia. Inaba is now also doubling down on growing the treat market, specifically for cats. Indonesia is a predominantly cat-oriented society, with Indonesia's Muslim-majority population widely cited as a factor discouraging dog ownership. In fact, a Rakuten Insight survey notes that Indonesia has the lowest dog ownership rate of the 12 Asian markets studied.



Rising shipping costs have not only discouraged some local businesses from venturing abroad but have also made it more challenging for foreign brands.

Competition is welcome

When asked about the emergence of local operators in Indonesia's premium pet segment, Nirwandar says he welcomes the increased competition, stating that more companies can help grow the overall category.

"It's always good to have more players coming in to grow the category. We're not going to be able to do it alone," he says. "Indonesia is a very large market, and most of it is still untapped. There is enough pie to be shared with different players."

Moreover, there is a significant economic moat around the product category. "Since we position ourselves in the smart premium sector, we can grow and still be profitable. We are not in direct competition with the Chinese brands, so it's quite safe for us," adds Compawpanion's Herman when asked about the changing competitive landscape and the arrival of new businesses.

Pinpointing the right customers

As the market becomes more fragmented, identifying the right customers is becoming a key challenge for pet food brands. "Finding exactly who would buy your product, which target market specifically, without you giving promotions, without you doing extra marketing, but because they really connect with your product – I think it's very important," says Herman.

Compawpanion has responded by refining its targeting for individual brands. For one of its brands, for example, the company focuses on newly married couples who do not have children or are considering starting a family within the next two to three years.

The strategy is aimed at consumers who treat their pets as part of the family and are looking for products that reflect that relationship. Indonesia's relatively young population provides a sizeable potential consumer base for this approach, with a median age of 30.7 years.



Herman argues that this level of targeting is important in a market where many brands still rely on broad marketing campaigns. “Most brands are doing a very massive kind of marketing, not targeted and specific,” she says.

Higher-value exports

The Indonesian government also sees the export market as offering new opportunities for local brands. Indonesia currently ranks 59th among global pet food suppliers, with a market share of just 0.03%, according to data from the Indonesian Trade Ministry. Between 2021 and 2025, however, Indonesia’s exports of pet food grew by 31.98%.

Fajarini Puntodewi, Director General of National Export Development at Indonesia’s Trade Ministry, tells PETS International that several factors are supporting the country’s pet food export prospects.

Besides the strong growth between 2021 and 2025, she points to an established export base across several markets – with India, the Philippines, Japan and Malaysia as Indonesia’s top export countries – and expanding market access through a range of trade agreements.

“We want to shift strategy from merely increasing the number of exports to increasing the value added and export quality,” she says.

International expansion

Some local brands that have seen robust growth domestically have already begun to explore export markets. Compawpanion has shipped its products to Singapore and Hong Kong, with Malaysia and Vietnam its next targets. But at the moment, the company is merely testing the water.

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“The global economic situation has made the export market not as interesting as it was two years ago,” admits Herman, noting that shipping costs are now very high.

The overseas markets also come with unique challenges for an Indonesian player. In Herman’s view, for example, many people are not aware that Indonesia can produce good, export-quality products. “We want to focus locally first,” she adds, hinting that the company’s global foray may have to wait until 2028, when the market is projected to be more stable.

Another pet food manufacturer building on its strong local foothold to develop the export market is Evopet. In February 2026, the company shipped three containers of pet food to the Philippines in a consignment worth \$176,000 (€153,000).

The shipment comprised 2,300 boxes of canned wet food, 11,200 boxes of pouch pâté and 12,000 boxes of pouch chunk-in-gravy. Trade Minister Santoso attended the inaugural export shipment.

In Indonesia’s cat food segment, the top three companies account for over 50% of the market share.

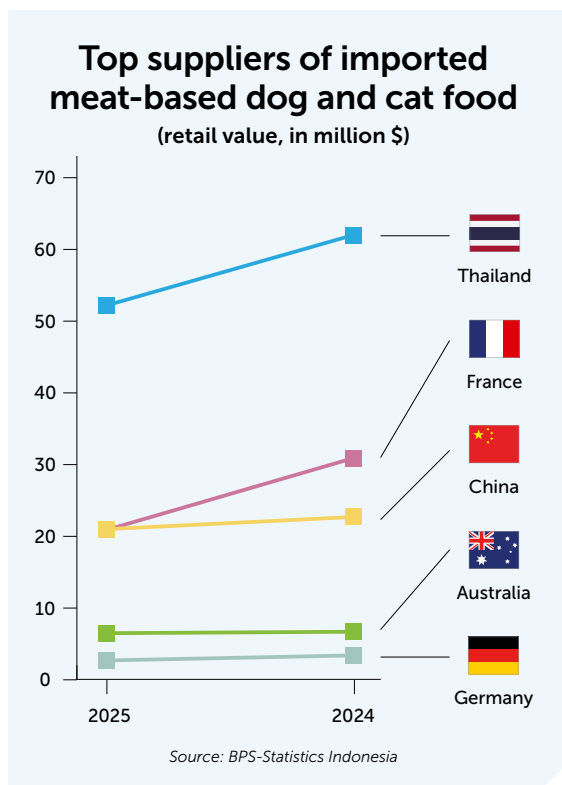
Brand switching offers opportunities

Rising shipping costs have not only discouraged some local businesses from venturing abroad but have also made it more challenging for foreign labels looking to build their presence in the Indonesian market.

Compawpanion’s CEO has seen multinationals adjusting their price points and observed a trade-down story unfolding, with some consumers preferring to switch brands rather than pay higher prices. This presents an opportunity for local players to grow their market share, but is not necessarily a straightforward win.

Back in 2023, pet ownership in Indonesia grew significantly on the back of pandemic-driven lifestyle changes. The pet food category’s expansion accelerated in parallel with that trend and attracted new players interested in capturing a share of the growth.

According to Herman, 400 new brands had been launched since 2023, but about half of them have ceased in the past year. They include Pawprints Inspired, an Indonesian direct-to-consumer pet-food startup launched in 2023 with a focus on insect-based nutrition.



Recent fluctuations

And despite the positive growth trend between 2021 and 2025, a closer look shows Indonesia’s pet food export activities have struggled more recently.

According to official data, pet food exports fell from \$10.8 million (€9.4M) in 2024 to \$8.7 million (€7.6M) in 2025 – a drop of 20.13%. Between January and July 2026, pet food exports decreased to \$4 million (€3.5M), compared with \$6.3 million (€5.5M) during the same period last year, amounting to a year-on-year decline of 36.4%.

“We view the correction in pet food product export value as a performance fluctuation over a specific period. That correction is not an indication that Indonesia’s pet food industry is losing its prospects,” concludes Puntodewi. ♦



B&B Verpackungstechnik GERMANY

From film to pallet: the machines behind every bag of pet food

Over 5,000 machines delivered, B&B still tailors each one to the customer's requirements.

Before dry pet food reaches the shelf, its bag must be made, filled and packed for the store. German machine builder B&B Verpackungstechnik builds equipment for the first and the last step guided by one principle: listen to the production floor first, then design the machine.

An engineering office at heart

The company's story begins in 1977. That year, Jost Bäumer opened a mechanical engineering design office in Germany, offering design services to industrial clients while developing ideas of his own. Over time, one of those ideas grew into a specialty: machinery for producing pre-made bags.

That engineering-office mindset has never really left. B&B still approaches a new project the way a design consultant would. It looks at the customer's product,

material and plant first, and only then decides what the machine should look like. This is not a company that sells from a catalog.

Where the bag is born

B&B's bag-making machines convert film into finished, pre-made bags. Customers range from large packaging groups to pure converters, which supply pet food producers with the bags they fill.

Today's pet food bag has many jobs to do. It must protect the product, offer convenience features, carry the brand, run reliably on high-speed filling lines and meet growing sustainability requirements and regulations. That makes the converting step critically important.

B&B has supplied converters worldwide for decades and its machines are

especially strong when it comes to mono polyethylene (PE) and woven PP pinch bags and high performance. Customers can upgrade their B&B equipment throughout its lifecycle to keep pace with market trends. B&B is also the first port of call for developing new bag designs and finding ways to convert them commercially. [► SEE NEXT PAGE](#)



Sample pet food bags from PE-laminate and woven PP



When the bag is filled

The second chapter of B&B's history opened with the acquisition of MAF Verpackungstechnik, which brought end-of-line packaging into the company.

These systems take filled primary packs and package them for palletizing and shipment. B&B's machine range contains stretch film bundling, paper wrapping and case packing as well as tray, wraparound and case packers for all kinds of primary packages in dry and wet pet food.

For pet food manufacturers, this is the stage where efficiency and gentle handling of the primary pack are key. It is also where packs that look identical on a drawing can behave very differently in practice. B&B's Stretchpacker solved the problem of sustainable mono PE bags going through a shrink tunnel due to its stretch technology, while increasing bundle stability and reducing film consumption at the same time.

Everything under one roof

What sets B&B apart is not a single machine but the way its machines are made. The company keeps the entire value chain in-house. Machines are designed, assembled, programmed and commissioned at its headquarters in Hopsten, in north-western Germany, before delivery.

At the center of this setup is a large development department. Its engineers work on new machine concepts and adapt existing platforms to new bag

formats, materials and line requirements. Development, mechanical design, software and assembly sit side by side, so ideas can move from prototype to production machine without being passed between companies. For customers, this means one team that understands the whole machine.

Customers of every size

B&B is trusted by large multinational companies as well as family owned businesses with strong regional focus. In both bag-making and end-of-line packaging, it works internationally with global players in the pet food, packaging and other industries.

These customers rarely ask the same questions. B&B can therefore offer a standardized solution or a highly tailored machine, for example when a machine needs to fit in a tight space of an existing line. Serving both has made the company flexible by necessity.

A base in the US

The United States is one of B&B's most important markets and the company has its own sales and service base in Green Bay, Wisconsin. Being on site gives North American customers a nearby contact and quick support. It also keeps B&B close to developments in one of the world's largest pet food and packaging markets.

Service that travels

A packaging machine is a long-term commitment and often stays in production for many years after

commissioning. B&B backs its equipment with a worldwide service organization, supported by international service partners, that helps customers wherever their lines are running. That support covers installation and commissioning, maintenance, spare parts and later modifications as well as service contracts.

Looking ahead

The pet food industry keeps changing. New recipes, new pack sizes and a growing focus on recyclable and mono-material packaging all place new demands on converting and packaging equipment.

B&B's ambition is to meet these changes through its own development work, keeping its machines in step with new materials and formats while expanding its international presence.

The bottom line

Almost five decades after Jost Bäumer opened his design office, B&B Verpackungstechnik is still a company of engineers.

Its portfolio has expanded from bag-making machinery to include end-of-line systems and the company has grown from a German workshop serving international markets into an organization with more than 250 employees, a large development team, a base in Green Bay and an installed base of more than 5,000 machines.

For pet food producers and packaging converters, this means a reliable partner with a high level of technical expertise that helps them grow their businesses and stays on hand worldwide long after a machine is installed. ♦

B&B Verpackungstechnik GmbH
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Europe's new rules change the packaging equation

The PPWR is transforming compliance into a broader business challenge that involves data, suppliers, governance and costs.



Sofie Boddez
*Climate Change & Sustainability Services
EY Belgium*

Four key phases typically emerge in the day-to-day work of complying with the latest EU regulations. They start with defining the right scope and determining whether the items in question are considered packaging or products – but putting long-term systems in place is just as important.

Future-proof strategies

When the EU Packaging and Packaging Waste Regulation (PPWR) entered its application phase in August 2026, many companies expected a disruptive compliance challenge. Yet the discussions taking place today with manufacturers, retailers and packaging suppliers across Europe feel very different from those of a year ago.

Most companies placing packaging on the European market are either already compliant with the first PPWR requirements or actively working toward compliance. The discussion has therefore evolved from “What is PPWR?” to “How do we build a future-proof packaging strategy that supports both compliance and competitiveness?”

One of the biggest risks today is that companies treat PPWR as a regulatory project owned exclusively by compliance teams. In the projects moving the fastest, they are first bringing in procurement, compliance, supply chain and legal people, while packaging is treated as a strategic topic connecting sustainability,

packaging development, procurement, regulatory affairs and finance.

The first milestone

The PPWR is replacing the Packaging and Packaging Waste Directive with directly applicable EU rules that aim to reduce packaging waste, improve recyclability and strengthen circularity. This covers all packaging materials and every economic operator in the value chain.

While most long-term requirements on recyclability, recycled content and reuse will only become fully applicable in the coming years, the first compliance milestone arrived in August 2026. This required organizations to demonstrate their conformity and to maintain supporting technical documentation.

Recent European Commission guidance has introduced a more pragmatic enforcement approach. The obligations have not changed, but companies with a credible compliance roadmap – and active implementation efforts – are likely to gain some practical flexibility during the transition. That is not permission to delay, but it does offer a bit of relief to companies rushing to become compliant.

Phase 1: Role mapping

The first challenge is understanding your role. Role identification is often where companies encounter their first surprises. One and the same business may be a manufacturer for one packaging flow, an importer for another and have entirely different responsibilities in a private label scenario.

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Because obligations depend on those specific roles, it's essential to carry out this exercise for every packaging flow – including sales packaging, grouped packaging and transport packaging.

Role determination remains a genuine gray area in practice, particularly where companies customize packaging dimensions, specifications or branding. Role mapping can become particularly challenging in these situations, as seemingly small customizations can shift the responsibilities of the parties involved.

One practical approach is to start by mapping packaging flows and roles before collecting any documentation, while clustering similar packaging types instead of assessing every SKU individually. This saves time and usually brings gray areas to light earlier rather than later.

A structured decision-tree approach can help support this process, while documenting every role determination decision and the assumptions behind it. When a customer or regulator later asks why a certain role was assigned, having the underlying reasoning documented can make the difference between a compliance approach that is defensible and one that is difficult to substantiate.

Phase 2: Short-term requirements screening

Once roles have been defined, companies need to determine which short-term PPWR requirements apply to each packaging type. The current short-term requirements include assessing heavy metals and PFAS, environmental and/or reusability claims, and putting traceable packaging on the market.

The proof of compliance needs to be gathered in a technical documentation file and, where applicable, a Declaration of Conformity needs to be issued, based on this technical documentation.

Phase 3: Collecting documentation

The main challenge in proving compliance is gathering all the supporting evidence from suppliers for validation. A manufacturer – the PPWR role with the most responsibilities – must demonstrate compliance through documented evidence. This is often made up of supplier declarations, material specifications,

test reports, substance information and packaging composition data across multiple supply-chain tiers.

A pragmatic, risk-based approach is becoming market practice and can help companies manage the process more efficiently. Where suppliers already hold technical documentation and compliance evidence, this can provide the foundation for the compliance file before companies turn to extensive testing programs. Testing has its place, but it should not be the default starting point.

Using structured methods for assessing the applicable requirements, organizing the evidence collection and bringing the information together into a Declaration of Conformity, can make a significant difference in how quickly and confidently companies move through this phase.

Traceability is a growing concern in that respect, particularly for consumable packaging materials such as stretch film and for packaging sourced from multiple suppliers. Transport packaging also deserves a special mention here. It is becoming one of the more challenging PPWR topics, with gray zones that often create more uncertainty than the primary packaging itself.

Phase 4: Long-term management

PPWR compliance is not a one-time exercise. Specifications evolve, suppliers change, new formats appear and requirements could increase. Organizations need robust governance, clear ownership and controlled data processes to keep documentation current. The best performers already integrate PPWR compliance into broader packaging management rather than treating it as a standalone initiative.

Don't overlook EPR

While technical compliance gets the most attention, financial compliance matters just as much. Under the Extended Producer Responsibility (EPR) framework, the producer role determines who is financially responsible for collecting and treating packaging waste, and therefore who must register, report volumes and pay EPR fees. Understanding producer obligations is becoming just as important as understanding PPWR manufacturer obligations.

The goal of reviewing the definition of the producer role was harmonization across Europe, but in practice there is still a lack of clarity in the market, with EU member states taking different approaches. It's advisable to keep an eye on these developments, especially if you sell in multiple countries, where responsibility models can differ considerably. This could create unexpected fee exposure or registration obligations that were not budgeted.

The financial aspect

PPWR is likely to have its greatest long-term impact on the pet industry in the way it changes packaging economics. Historically, these decisions were driven by product protection, shelf appeal, logistics efficiency and consumer convenience, but they'll now often become financial decisions, too.

Future choices will need to balance recyclability grades, recycled-content requirements, packaging minimization, country-specific EPR fee structures, operational feasibility and consumer expectations. For pet food packaging, recyclability will remain a specific challenge – given the widespread use of multilayer materials.

The financial implications are real. Packaging EPR fees already vary considerably by country, material and recyclability profile. Meanwhile, eco-modulation increasingly rewards recyclable packaging and penalizes poorly recyclable formats.

So, more and more companies are revisiting packaging formats – not because they are non-compliant today, but because they could become economically disadvantageous as PPWR requirements evolve.

Packaging management systems

As packaging data becomes a critical business asset, visibility and governance matter just as much as the compliance outcome itself. Compliance cannot remain fragmented across spreadsheets, supplier emails and disconnected databases. A number of dedicated packaging management solutions are now available, and there has been growing interest in them over the past year. Selecting the right one depends on company size, product complexity and existing IT architecture.

Creating opportunities

Businesses and organizations across different sectors that are further advanced in their PPWR readiness are beginning to see the regulation as an opportunity. It helps them to strengthen packaging governance, improve supplier and customer engagement, enhance data quality and make better-informed packaging decisions.

Customers increasingly expect suppliers to demonstrate their compliance with this highly visible piece of legislation. The companies that can provide clear evidence of compliance are certainly better positioned to build trust while also avoiding surprises further down the line.

For the pet industry, this is a real opportunity. Packaging is no longer only about protecting products or catching a shopper's eye on the shelf. It is becoming a strategic lever that shapes sustainability performance, operational efficiency, regulatory compliance and cost competitiveness. The companies that recognize this early on will not just be prepared for PPWR – they'll be better positioned to compete in today's circular economy. ♦

6 steps to getting PPWR right

1. Start by **mapping packaging flows** and roles before collecting documentation
2. Cluster **similar packaging types** for assessment
3. Engage **procurement, compliance, supply chain and legal teams** early on
4. Validate **supplier documentation** carefully and distinguish between a **formal signed Declaration of Conformity** and other supplier statements
5. Use **supplier information and risk assessments** for compliance evidence
6. Don't forget to document **your role determination** decisions to create a **defensible compliance** approach

Built for recyclability, designed for PPWR



Built for Recyclability: What PPWR Really Means for Pet Food Packaging

For pet food brands, PPWR poses an awkward question: the multi-material laminates that keep kibble crunchy and wet food shelf-stable are exactly the structures regulators most want gone. Grease resistance, oxygen barrier and aroma lock have historically been delivered by combining plastics, foils and coatings that are difficult or impossible to recycle. PPWR doesn't ask the industry to choose between performance and compliance. It asks it to stop treating them as separate problems.

The first PPWR requirements have applied since 12 August 2026, and for many businesses that date was less an ending than a starting line. PPWR applies to all packaging placed on the EU market, wherever it is made, so it matters just as much to brands exporting into Europe from the UK, the Americas and Asia. The businesses coping best have stopped treating compliance as a one-off audit and built it into material selection, supplier agreements and product development. At Tyler Packaging, we've supplied the pet food industry since 1982, and this year we've been helping customers move from "are we compliant?" to "are we ready for what's next?"

Practical Solutions, Not Just Advice

Talk is easy; packaging is physical. For pet food, compliance work tends to come down to a few pressure points:

- **Barrier vs. recyclability trade-offs** – material audits that show where pouches or bags fall short, without compromising the grease resistance and shelf life wet and dry food depend on
- **Redesign support** – switching from multi-material laminates to mono-material PE or PP, cutting over-packaging while holding the line on resealability and freshness
- **Recycled-content sourcing** – verified, traceable post-consumer recycled (PCR) material. Only PCR counts towards PPWR targets; post-industrial recycle does not

- **Documentation support** – the paperwork to prove compliance, including evidence against the PFAS limits in force for food-contact packaging since August (25 ppb per substance, 250 ppb summed, 50 ppm total fluorine), which leading pet food brands are adopting as best practice

The numbers pet food brands most need to know are the recycled-content targets. Because PPWR's "contact-sensitive" definition covers animal feed, plastic pet food packaging other than PET must contain at least 10% PCR from 2030, rising to 25% by 2040. Food-grade PCR for PE and PP is still scarce, so brands that secure supply early will be better placed.

The detail most pet food teams overlook: PPWR cares not just whether a pouch is technically recyclable, but about the purity of the recycle that comes out the other end. A mono-material structure sorts cleanly on NIR scanners and reprocesses into a single-polymer stream that can genuinely replace virgin material. A laminate of plastic, foil and paper produces contaminated, lower value regrind. Recyclate quality is one of the factors the Design for Recycling delegated acts (due by January 2028) will use to set each format's grade, so it's the difference between a Grade A/B pouch and one that scrapes by on C, or fails to qualify at all.

"The pet food brands getting ahead of this aren't the ones with the biggest compliance budgets – they're the ones who started asking 'can this pouch be mono-material?' a year before they had to." Andrea Mosca, European Business Development Manager.

A Redesign in Practice

One pet food customer came to us with a multi-material barrier pouch, strong on grease resistance and shelf life but a poor fit for PPWR's recyclability requirements. After a material audit, we moved it to a mono-material PE structure that preserved the barrier performance the product needed and is recyclable under current RecyClass guidelines. The result: a pouch that still performs on the shelf and is positioned for a Grade A or B outcome, with lower eco-modulated EPR fees where Member States apply them.

How We Can Help

Whether your packaging needs work or you want a second opinion, Tyler Packaging is ready to talk. As members of the Pet Sustainability Coalition, UK Pet Food and the American Pet Products Association (APPA), we understand the sector's pressures, not just the regulation in the abstract.

We offer:

- A free initial packaging and materials review
- Tailored redesign proposals for stand-up pouches, spout pouches and flat-bottom bags
- Ongoing support as regulations develop

Preparing for What's Still to Come

The next fixed points on the calendar:

- **January 2028** – deadline for the delegated acts setting the Design for Recycling criteria
- **January 2030 at the earliest** – recyclability grading becomes enforceable. Only packaging achieving Grade A ($\geq 95\%$ recyclable by weight), B ($\geq 80\%$) or C ($\geq 70\%$) may be placed on the EU market. Recycled-content minimums also apply, including 10% PCR for most plastic pet food packaging, alongside EPR fees modulated by recyclability grade
- **January 2038** – Grade C is phased out; only Grades A and B remain permitted
- **2040** – recycled-content minimums rise to 25% for most plastic pet food packaging

Businesses that build flexibility into their packaging strategy now will find each milestone an adjustment, not a scramble.

Get in touch with our team today to make sure your packaging is built for where PPWR is going, not just where it's been.

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



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Circling back: rethinking pet food packaging

As Europe enforces stricter recyclability and recycled-content requirements, the industry needs to balance cradle-to-cradle principles with safety, shelf life and operational demands.



David Palacios Rubio

Editor-in-Chief

GlobalPETS

The EU's Packaging and Packaging Waste Regulation (PPWR) started to come into effect in August. It is accelerating the transition to sustainable practices right across the pet industry's packaging sector, while prompting companies to reformulate products and adapt their packaging strategies.

From voluntary to mandatory

The PPWR's goal is to move circularity from a voluntary corporate objective to a regulatory requirement for market access across EU member states. In practical terms, this represents a significant milestone for the European packaging industry.

As voluntary sustainability ambitions become market access requirements, companies face a range of challenges, says Martina Schildendorfer, Innovation & Product Sustainability Manager at Constantia Flexibles, a manufacturer of flexible packaging for consumer and pharmaceutical products.

"Food protection remains the top priority, and the challenge is to develop packaging materials that both protect the product and can be effectively recycled at the end of their life," she explains. Schildendorfer goes

on to say that features designed to protect food can make recycling more difficult in some applications. "The task is to engineer solutions that achieve both."

Fitness for purpose

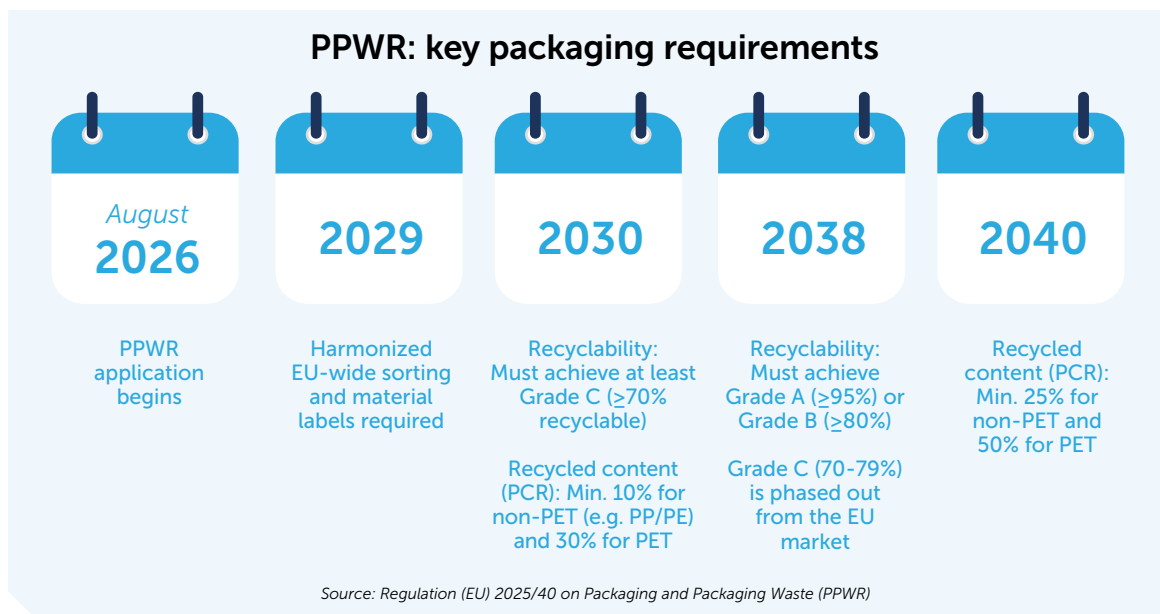
For the pet food industry, one of the key challenges is balancing circularity with packaging performance. Adam Ferguson, Senior Global Marketing Manager at Huhtamaki, a supplier of sustainable packaging headquartered in Finland, says: "Improving circularity cannot come at the expense of the essential functions. The packaging must remain fit for purpose."

For Coveris, the challenge is to balance three priorities: maintaining the product protection required by pet food applications, delivering the visual and functional performance expected by brands and consumers, and ensuring that packaging can be effectively recycled. Renaud Gautier, Key Account Manager for Pet Food at the Austrian packaging company, explains: "Recyclability is no longer an additional sustainability feature. It is becoming a core design requirement."

Designing for recyclability

As Gautier says, this means that recyclability needs to be considered from the earliest stages of packaging development, rather than being addressed once the design is already established. "High-quality graphics, finishes and shelf appeal remain

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important for pet food brands, but inks, coatings and decorative elements must increasingly be assessed for their impact on recycling,” he points out.

The industry is therefore moving toward eco-design: “Where material selection, product protection, branding and end-of-life performance are considered together,” says Gautier. The goal is not necessarily to eliminate all complexity, but to use it more selectively: fewer incompatible materials, carefully engineered barrier layers and packaging structures designed to work within established recycling streams.

No universal response

For packaging suppliers and pet food manufacturers, compliance requires significantly more than replacing non-recyclable laminates with recyclable alternatives. It demands a full re-engineering of flexible packaging structures to balance regulatory requirements with rigorous product safety, shelf life and processing standards.

Carlos Trubacz, Head of Product Sustainability, Flexible Packaging at Mondi Group, explains that the regulatory impact on pet food packaging goes “far beyond” replacing a material with a recyclable alternative: “The common thread is that circularity is becoming another core performance requirement. The task is to

address it alongside product protection, machinability, convenience and cost rather than optimize one at the expense of another.”

Trubacz also says that meeting circularity criteria requires sophisticated material engineering rather than basic substitution. “Pet food demonstrates particularly clearly why recyclability cannot be considered in isolation,” he states. Industry insiders agree that the challenge is to engineer recyclability into structures that continue to perform under demanding conditions. “There will, therefore, not be one universal packaging response to PPWR across pet food,” Trubacz adds.

Multi-layer to mono-material

The PPWR’s impact on dry and wet pet food formats varies significantly. Dry pet food packaging, which includes large-format bags and stand-up pouches with resealable zippers, represents the area most active in material conversion. The traditional multi-layer laminates used for dry food have been replaced in recent times by mono-material polyethylene (PE) or polypropylene (PP) structures.

The goal is not necessarily to eliminate all complexity in packaging, but to use it more selectively.

This new type of packaging must, of course, maintain the resistance needed to protect products, while remaining compatible with existing filling and packing processes.

Mondi partnered with French dry pet food producer Saga Nutrition in 2025 to transition a product line to a mono-material structure designed for recycling. This provides high-barrier protection against moisture, fat and odor, while also offering secure sealing and durability for storage, shipping and handling.

Retort pouch sterilization

Mono-material retort packaging is now an established commercial option, although its adoption remains subject to demanding technical requirements. Packaging suppliers have developed recyclable mono-PP structures for retort applications – including stand-up and sealed pouch formats – designed to withstand thermal processing while maintaining seal strength, structural integrity and the barrier properties needed to protect product quality and shelf life.

Retort pouches are exposed to aggressive heat sterilization, typically at temperatures above 120°C, placing demanding requirements on the packaging structure, seals and barrier layers. Some solutions are also designed to run on existing filling equipment at industrial speeds, helping manufacturers to adopt recyclable structures without fundamentally changing their production lines.

The role of aluminum

Mono-material structures do not eliminate the need for conventional barrier materials in all applications. Where very high barrier performance and direct contact with products during high-temperature processing are required, aluminum-based formats remain widely used. As aluminum is highly valuable and retains its material properties through recycling, the PPWR imposes no minimum recycled-content targets for aluminum packaging.

The regulation does, however, require the European Commission to – by 2032 – review whether measures or targets should be introduced for recycled content in non-plastic packaging, and this could potentially include aluminum.

Industry insiders agree that the challenge is to engineer recyclability into structures that continue to perform under demanding conditions.

Gerald Griessler, Product Manager Pet Food with responsibility for aluminum development at Constantia Flexibles, says: “The recycling content for aluminum is an important lever, but it primarily drives decarbonization rather than improving the material’s already very high recyclability.”

Prospect of secondary legislation

A significant operational challenge for the packaging sector is the timing of the EU’s secondary legislation. While the PPWR establishes the 2030 deadline, many of the detailed rules defining how packaging must be designed and assessed for recyclability are being developed separately.

From 2030, packaging placed on the EU market will need to comply with harmonized Design for Recycling criteria. This means that manufacturers will need to make investment and packaging decisions before all the technical requirements are fully established.

Another complication is that the delegated acts detailing the precise testing protocols and criteria for evaluating each packaging format’s recyclability are not scheduled for adoption by the European Commission until January 2028. Ferguson says: “Huhtamaki would be cautious about describing any specific product as fully ‘PPWR compliant’ at this stage, because several technical requirements and implementing acts are still being defined.”

Trubacz echoes the complexity of planning during this transition window, saying it creates a “significant implementation” challenge for Mondi and other manufacturers, as packaging development takes time, and companies need to prepare now, while some of the criteria against which future packs will ultimately be assessed are still being finalized.

Industry support

The European pet food industry broadly supports the PPWR objectives. According to

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the European Pet Food Industry Federation FEDIAF, manufacturers have already been working for years to improve packaging. “Packaging performs an essential function for our sector. It’s crucial for delivering safe pet food, preserving nutritional quality and maintaining product integrity throughout the shelf life,” Deputy Secretary General Franco Garbelotto tells PETS International.

Creating a clear way forward

Garbelotto says that any transition “needs to be delivered in a way that maintains these functions while improving recyclability and reducing waste”. With the PPWR’s phased requirements now beginning to apply, FEDIAF is focusing on helping pet players to navigate implementation by providing practical and harmonized support.

“Clear and consistent guidance, realistic timelines and the European Commission’s timely adoption of implementing and delegated acts are essential to give companies the certainty they need to invest and adapt,” Garbelotto adds. FEDIAF will continue to engage with European institutions to support the regulation’s environmental objectives, while ensuring that changes to packaging safeguard the safety and integrity of pet food.

Meeting recycling targets

Minimum post-consumer recycled (PCR) content mandates represent another major consideration under the PPWR. While mechanically recycled polyethylene terephthalate (PET) is approved and widely used for direct food contact, mechanically recycled PE and PP thin films currently lack the purity and performance needed for demanding applications such as retortable pouches.

Supplies of high-purity PCR material are expected to become limited as deadline dates approach. Constantia Flexibles warns that a material supply gap is likely by 2030, while official EU calculation and verification methodologies for PCR percentages are only expected by late 2026. The company offers some clear guidance. “Our message to customers is simple: start now so you’re ready in 2030, instead of competing for material at the last minute,” Schildendorfer says.

Waste infrastructure challenges

The PPWR introduces a requirement that packaging must be recycled “at scale” across EU member states by 2035, tying product design directly to waste management infrastructure. “To realize the full benefits of the regulation, Europe will also need continued investment in collection, sorting and recycling infrastructure, stronger markets for recycled materials, and well-functioning extended producer responsibility schemes,” Ferguson says.

Coveris has a No Waste vision and strategy, which focuses on advancing circular packaging solutions and keeping plastic in the value chain. Gautier explains: “Closing the loop requires not only designing packaging for recycling, but also matching packaging structures with the most appropriate recycling technologies.”

Mechanical, chemical and solvent-based recycling can play complementary roles depending on the application. Through its ReCover waste management process, Coveris is also developing its own recycling capabilities and models, helping to recover plastic waste and return it to the packaging value chain.

Rethinking the role of suppliers

When asked about the evolving role of packaging manufacturers, Trubacz points out that suppliers must now serve as strategic partners through this transition. He concludes: “Overall, PPWR changes the design equation for pet food packaging.”

For packaging producers, that means “moving beyond simply supplying a material or format” and increasingly helping customers to navigate the transition from regulatory requirements to packaging solutions that are technically robust, industrially viable and compatible with the recycling systems of the future. ♦



CETEC FRANCE

Slim your bag now

CETEC's SlimBagger meets PPWR and SB 54 requirements by cutting bag headspace, not performance.

The European Packaging and Packaging Waste Regulation (PPWR) is changing the way manufacturers approach packaging. From 2030, packaging placed on the EU market will have to be designed so that its weight and volume are reduced to the minimum necessary while maintaining its functionality.

For the pet food industry, this raises a practical question: how can manufacturers reduce packaging material without reducing the quantity of product inside the bag and compromising the production performance of the line?

A new filling approach

At CETEC, this challenge led to a rethink of the filling process itself. The SlimBagger reduces bag dimensions while keeping the same product quantity and throughput.

The principle is simple: make better use of the available volume inside the bag. The SlimBagger combines an optimized filling process with product settling during filling, allowing more product to be packed into a smaller volume and reducing unnecessary headspace.

It features one bag magazine and two filling spouts. While one bag benefits from an extended filling and settling cycle to maximize the use of its internal volume, the next bag can already be processed on the adjacent spout. This Mono-Duo operating principle means that additional filling time does not have to mean lower production output.

Up to 20% smaller bags

Tests carried out in cooperation with major European packaging suppliers have confirmed the concept. Depending on product and bag characteristics, the SlimBagger can enable bag height reductions of up to 20%, while maintaining the original quantity of product inside.

Smaller bags may also open opportunities for optimizing palletization, storage and transport, generating potential savings throughout the logistics chain while reducing the overall environmental footprint.

Beyond compliance

The benefits go beyond regulatory compliance. Using smaller bags means

less packaging material and therefore lower packaging purchasing costs – savings that add up across millions of bags a year.

In other words, packaging reduction should not only be seen as a regulatory constraint. With the right filling technology, it can also become an opportunity to improve both environmental and economic performance. The investment typically pays back within three years.

As PPWR moves packaging toward greater material and volume efficiency, the challenge is not simply to use less packaging. It is to use packaging better.

With the SlimBagger, CETEC is applying that principle to the pet food production line. ♦

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Pet's Up UK

How Pet's Up built Chewllagen into its flagship chew

The manufacturer and distributor has turned South American cattle hide into a fully digestible alternative to traditional chews.

When Pet's Up launched Chewllagen, the aim was to offer dog owners the long-lasting appeal of a hide chew in a format that is fully digestible. The product has since become the company's flagship and bestseller.

Founded in 2001 as Lennox UK, the business began as a specialist in natural hide chews sourced from South America. Andres Rodriguez, a former Lennox employee, acquired the company in 2014 and co-founded Pet's Up the following year to focus on brand development and international distribution.

Headquartered in Essex, UK, and Oldenzaal in the Netherlands, the company is now present in more than 20 European countries and was named Exporter of the Year at the 2023 Pet Industry Federation (PIF) Awards.

From hide to collagen

Chewllagen is made from collagen extracted from South American grass-

fed cattle hide. The collagen proteins, mainly type 1 and type 3, are hydrolyzed through a heating process into smaller, more easily digestible molecules.

The collagen is then shaped and baked, giving it a bread-like texture, before being dipped in real beef or chicken.

The result is a fully digestible chew that doubles as a natural source of protein. The Classic range spans rolls in several lengths, mini and medium multipacks, a small donut and chips, sold in retail-ready display boxes.

A super premium extension

The company has since taken the concept a step further with Chewllagen Bar.

Where the original relies on pure collagen and a meat coating, the bar combines beef collagen with tapioca, resveratrol, vitamin C sources and a supplement of essential vitamins and minerals.

The bar is grain-, gluten-, sugar- and GMO-free, and comes in cheese, peanut butter and beef flavors across small, medium and large sizes. Pet's Up positions the two products as complementary rather than competing: the Classic as an affordable premium collagen treat, the bar as a super premium evolution of the same concept.

Alongside its branded portfolio, the company continues to support private label customers, applying the same manufacturing expertise to develop competitively priced products for their catalogs.

Partnership opportunities

Retailers and distributors interested in stocking Chewllagen, or in private label development, can contact the company via info@petsup.co.uk or visit the website below. ♦

Pet's Up Products BV

petsup.co.uk

Amazon pulse: the pet dental care boom

Keeping a pet's teeth healthy has not always been top of the list for owners. But new formats and greater awareness are changing all that.



Victoria Mauriello
Head of Consumer Goods & Retail
Similarweb

A chew tossed in the cart; a resolution made in January but forgotten by February. Recent Similarweb Shopper Intelligence data across Amazon in the US, UK and Germany suggests that pattern may be shifting, with dental product adoption varying widely by pet type and per market.

Dogs ahead, cats behind

According to the Similarweb data, sales in Amazon US's Dog Dental Care category topped 8.5 million units in the 12 months to July 2026, up nearly 19% against the same period a year earlier, with revenue climbing 17% to \$142.5 million (€125.1M). Conversion improved too, rising from just over 25% to nearly 29%, so a growing share of shoppers who land on a dental product page are following through and buying.

Cats, on the other hand, haven't kept pace. Over that same 12-month window, Similarweb data shows that sales in Cat Dental Care were essentially flat year over year (YoY) at 4.4 million units, even as revenue rose 8% on higher price points.

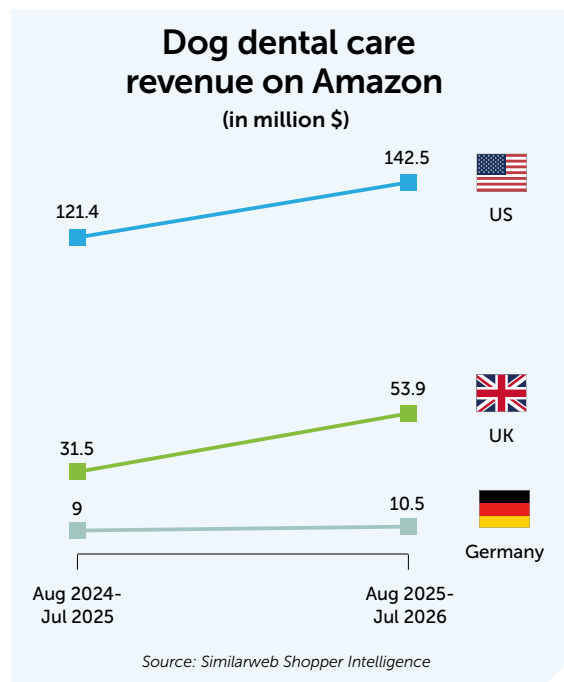
More strikingly, conversion for cat dental products fell from just over 26% to under 23%, despite a 16% jump in page views. Cat owners are looking more and buying proportionally less, a gap worth watching as more brands compete for a still underserved corner of the category.

Powder on the rise

On-site search data for the same 12 months on Amazon in the US suggests that dog owners aren't just buying more dental products – they're switching formats too. The new big thing in this pet segment is dental powder.

'Dog toothpaste' and 'dog toothbrush' remain the two biggest search terms in the category, but close behind them is a format that barely existed a few years ago: powder that is sprinkled onto food

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Amazon sales of dog dental products

(in units sold)



US



8.51 million



UK



3 million



Germany



594,600

Source: Similarweb Shopper Intelligence, August '25-July '26

rather than brushed onto teeth. Together, 'Dog teeth cleaning powder' and 'dog dental powder' drove well over 3 million clicks over the period, and neither term is owned by a legacy pet health name.

Virbac, a veterinary-grade brand, still commands the toothpaste conversation, taking over a third of clicks on 'dog toothpaste' and close to 90% of clicks on searches for its own enzymatic formula by name. In terms of powder, however, Virbac has essentially no presence, as that segment belongs to newer, social-first brands.

Unlike dogs, where powder has pulled ahead as the format to beat, cat dental spend remains split across dental treats and chews (such as Feline Greenies and Purina Dentalife), water additives (Oxyfresh) and powder (ProDen PlaqueOff). No format has consolidated the category the way powder has for dogs, which may be part of why conversion is struggling to keep up with interest.

Winning in non-branded searches

Pet Honesty is a useful illustration of this shift in dental product searches. Similarweb data shows the brand held roughly 8% of all on-site search clicks in Amazon US's Dog Dental Care category over the 12 months to July 2026, and close to 6% of category revenue, a meaningful position for a brand that didn't exist in most pet owners' vocabulary five years ago.

Its edge isn't brand recognition. Of Pet Honesty's clicks in the category, 81% came from non-branded searches, terms like 'dog dental powder' or 'dog teeth cleaning

powder' rather than the brand name itself, and 62% of its total clicks were organic rather than paid. The brand is winning the moment a pet owner searches for a solution, before they've decided who to buy it from – largely without paying for placement.

Different promotional calendar

Search interest for dental health products also runs on its own calendar. Across the past two years of Similarweb Shopper Intelligence data, on-site clicks built steadily from January into a spring peak, tracking closely with National Pet Dental Health Month each February in the US and Canada, and the wellness push that follows it.

That's a different rhythm from the July and October spikes elsewhere in the pet category, which are tied to the annual Prime Day deal event in June and fall promotions. Brands running a February-forward promotional calendar for their dental health products are positioned to capture this demand well before a Prime Day-only strategy would even kick in.

Beyond the US: UK and Germany

The picture outside the US looks even stronger. Sales in the UK's Amazon Dog Dental Care category, for example, showed huge gains YoY in the 12 months to July 2026 – up 59% in units and 71% in revenue – with conversion improving alongside demand, rather than being diluted by it. Supply and interest are scaling together in the British market.

Germany tells a more complicated story. Unit sales grew a modest 10% and revenue 16%, but page views

rose nearly 40%, pulling conversion down from under 10% to under 8%. The number of dental listings on Amazon.de grew 42% over the same window, at more than twice the pace of sales.

It looks like more products are competing for the same shopper attention on this Amazon site and, so far, that attention isn't converting. That shows how assortment growth and demand growth don't always move together, even in a category this hot.

Indications from the Asian market

Japan offers a glimpse of where this category may be headed next. Similarweb Google search data shows that a curated group of Japanese-language dental product and care behavior terms – 'dog toothbrush', 'dog dental care', 'cat dental toys', 'how to brush a dog's teeth', etc. – grew 56% YoY, when comparing May-July 2026 with the same months in 2025.

So, looking at search interest rather than on-platform sales, these signals point in the same direction as the findings in the US, the UK and Germany. Pet owners are actively looking for dental solutions well ahead of most retailers' assortments catching up to that demand.

Strategic priorities

A few takeaways follow from this. Lead with format, not just brand. The powder search terms driving dog dental growth aren't dominated by legacy names, leaving room for a challenger brand to own the category conversation in the way Pet Honesty has.

Build a February-forward calendar in the US. The seasonal spike here tracks National Pet Dental Health Month, not Prime Day. Brands that only plan around July and October promotions will miss the window when purchase intent is actively building.

Don't write off cat dental. Flat volume and softening conversion don't mean demand is missing. Today's assortment just hasn't cracked what cat owners are actually looking for. That gap is an opening for a brand that gets the format right.

And in markets like Germany, watch assortment growth as an early-warning signal. When the number of listings grows faster than sales, it means more products are competing for the same attention – something worth tracking before it shows up in your own conversion numbers.

Strong rationale for growth

Pet dental care is part of a broader shift – the same wellness push driving pet owners toward fresh food, functional ingredients and preventive care more generally. The products winning right now make daily health maintenance easier rather than asking owners to do more work.

For the companies and brands that are willing to compete on both format and search visibility rather than just legacy trust alone, the online dental category still has room to grow. Dogs, cats and manufacturers will all benefit. ♦



The shifting sands of insect protein research

A decade of studies has broadened the scientific assessment of insect inclusion in pet food from protein quality and digestibility to safety, palatability and potential health benefits.



Alexandra Wesker
Contributor
PETS International

Over the past 12 years, scientific evidence on insects in animal nutrition has expanded considerably. PETS International analyzes the development of the research landscape and how interest has followed the industry's growing adoption of this category of ingredients.

Diving into the research

The mid-2010s witnessed the first introductions of black soldier fly larvae (BSFL) and mealworm into pet food in Europe by Dutch companies Jonker (2014) and Trovet (2015) and German brand Josera (2016). This was followed by significant investment in the launch of BSFL-focused pet food brand Yora in the UK in 2020.

To track the developing research over the past 12 years, a search was conducted in Google Scholar using a combination of pet-related terms — including 'pet', 'pets', 'cats', 'dogs', 'feline' and 'canine' — together with terms related to insects and insect species, such as 'insect', 'BSF', 'BSFL', 'mealworm', 'cricket', 'grasshopper' and 'silkworm'. Scientific and creditable publications were then assessed for relevance and manually included or excluded from the analysis.

Adjustments in focus

It is clear from the number of published papers that emphasis in early work included less common species such as silkworms and grasshoppers, then shifted to more focused work on BSFL, reflecting the direction of

travel by the industry to incorporate this protein source into commercial pet foods.

Interestingly, a similar search for patents related to insects as ingredients between 2014 and 2026 shows a move from protecting cultivation methods through to pet food formulations with specific technical and biological claims, while more recent patent applications consider downstream processing and functional assertions.

Nearly half of the patents are for cultivation methods and around a third are for insect-based formulations for pets.

The rise of BSFL

Early on, science was well on its way to investigating the sustainability credentials of insect over traditional agricultural proteins and, while carbon footprint, water usage, land use and the cost of rearing were affected by insect species and their feed substrate, it was suggested that insect protein had clear advantages over more traditional protein sources.

Although the focus now within the industry is mainly on BSFL, a wide variety of insects have been assessed for their utility in pet foods.

Decisions to progress with these potential insect sources were driven by the efficiency of substrate conversion, feasibility of scaling and pet owner perception, which all impacted on rearing costs and commercial viability. As a result of an advantageous feed conversion rate

and an economically viable inclusion rate into food, investment was made in BSFL and mealworm cultivation.

The short life span and lack of a mouth in adult black soldier fly means they are unable to bite, feed or spread disease and were therefore considered a low risk for neighborhood infestations and adverse health effects in the event of accidental escapes from any facilities.

The ability of BSFL to neutralize some pathogenic bacteria and the presence of bioactive components with health benefits in silkworms provided additional rationale for their use. It was from this point that research on the use of insects in pet food took flight.

Nutritional suitability

Insects were deemed useful as replacement protein sources due to their appropriate crude protein levels (somewhere between poultry and egg meal), a high amino acid profile and the presence of chitin, with potentially positive and negative implications for pets.

The nutritional composition depends on insect species, its development stage and feed substrate as well as time of harvest and rearing conditions.

Using DIAAS-like scores to assess protein quality, research from the University of Illinois Urbana-Champaign, published in *Journal of Animal Science* in 2024, showed the limiting amino acids in BSFL as methionine and cysteine in puppies, adult dogs and kittens, and phenylalanine and tyrosine in adult cats, while methionine, phenylalanine and threonine are the first limiting amino acids in mealworm for cats.

This is reflected in canine diets containing mealworm where crude protein levels are maintained and unsaturated fat content is improved but with a concomitant minor drop in lysine and methionine content, as shown by research from a team at the University of Warmia and Mazury, Poland, published in *Animals* in 2025.

Reflecting the increased inclusion of insect meals in pet food, scientific publications shifted from early work on the nutritional composition of the ingredients to their impact on marketed finished products. Concerns over higher levels of fiber, attributed to the presence

***If the best ingredient in the world
is unpalatable, then it is effectively
useless unless efforts are made
to mask the taste.***

of chitin, and lower than expected mineral values were noted, and should be addressed by the industry through targeted studies.

Comparing digestibility

It's essential that any pet food ingredient can be digested and utilized by the animal. Early work focused on *in vitro* studies for a range of insects including housefly pupae, house cricket, mealworm species, morio worm, black soldier fly and multiple cockroach species.

Black soldier fly, housefly and yellow mealworm showed high digestibility of amino acids *in vitro*, with partial fermentation of undigested fractions, as reported in 2016 in *Animal Feed Science and Technology* by a research team from the Netherlands.

In wet and dry feeds, mealworm appears to be more digestible than BSFL, although dry diets with BSFL showed higher essential amino acid index and biological value as an indicator of protein quality despite their lower digestibility.

Lower protein digestibility scores and higher fat digestibility have been noted in cats fed diets containing BSFL. This can be partially rectified by reducing the inclusion level, which improved protein digestibility in cats and kittens.

Palatability vs digestibility

In contrast, BSFL meal is well digested by dogs, even at inclusion levels up to 20%. However, reduced apparent digestibility in dogs and cats for dry matter, organic matter, crude protein and fiber in high inclusion BSFL and cricket diets have been attributed to increased chitin levels.

Good digestibility of BSFL oil has been noted when added to diets at up to 8%, even though it can affect palatability. Inclusion level is not always a good indicator of digestibility – no differences in digestibility scores were noted in dogs and cats fed speckled cockroach, Madagascar hissing cockroach and superworm larvae at 7.5% and 15%,

► [SEE NEXT PAGE](#)

as noted by studies published in *Journal of Animal Science* in 2018 by the Federal University of Lavras (dogs) and in 2022 by the University of Illinois (cats).

Equally important from a nutritional perspective is the palatability of an ingredient – if the best ingredient in the world is unpalatable, then it is effectively useless unless efforts are made to mask the taste.

Initial work noted decreased feed intake in cats given diets containing BSFL, although later studies demonstrated acceptance of BSFL at incremental levels even up to the complete replacement of traditional animal protein.

Safety and validation

Low inclusion levels of BSFL compared against an entirely poultry-based diet improved palatability and digestibility in cats at 3%, and in dogs at 5%, 10% and 15%. Interestingly, one sniff test showed that male dogs preferred mealworm while females preferred Turkestan cockroach.

Of critical importance is to ensure any new ingredient is safe for use at the intended inclusion level in the target animal. Numerous studies have consistently shown that insects are safe for use, although these

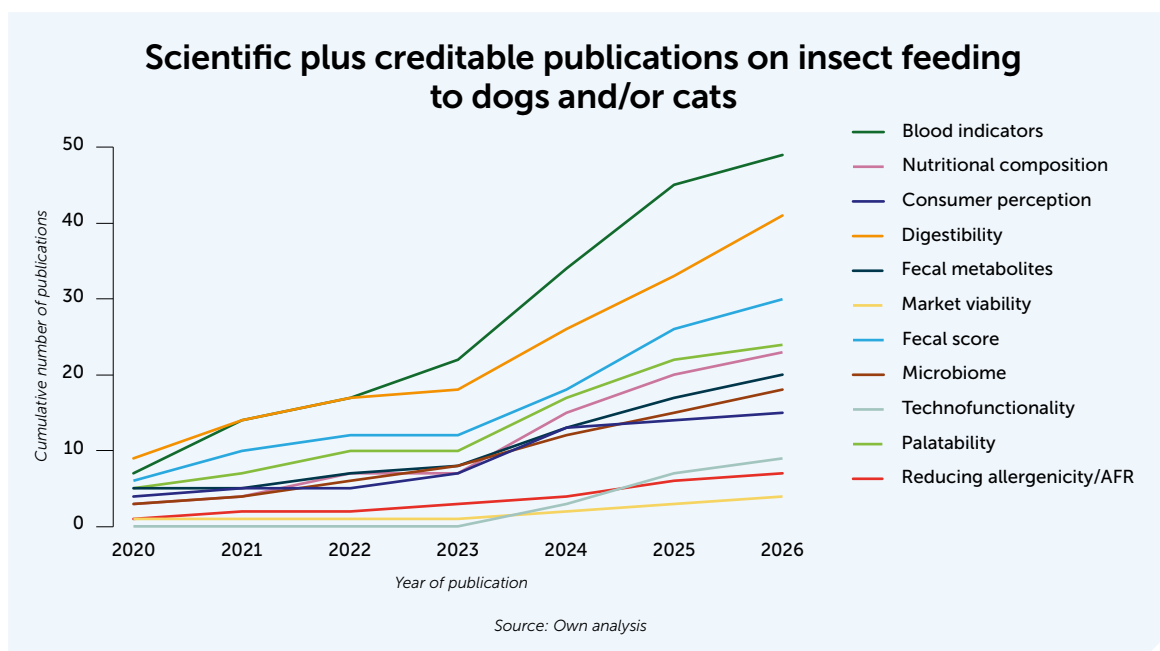
have sometimes been completed in a small cohort of animals for a short duration.

As a result, more studies are needed for true validation, ideally using more animals over a longer period of time. Changes in inflammatory blood markers or fecal quality are generally limited, suggesting that insects do not impact unduly on these important health parameters and can be regarded as a safe ingredient at the right inclusion level.

Considerations for the future

Clearly, much work has been done on assessing nutritional suitability, as well as the biological and technical functionality of insects as pet food ingredients. However, further study is needed to determine the underlying mechanisms for some of the observed benefits.

As new insects are considered as ingredients, there will be a need to conduct safety, digestibility and palatability studies, as well as leveraging the additional health and technical benefits likely to be found in insects as an ingredient for now and into the future. Geographical, condition, age and breed specific claims will also need to be considered for each new insect tested. ♦



From niche to necessity: EU turns focus onto insect protein

Political recognition and circular-feed initiatives are strengthening the case for alternative proteins, but regulatory bottlenecks still stand in the way of scale.



Steven Barbosa
Secretary General
IPIFF

The EU Protein Action Plan, presented by the European Commission (EC) in July, formally recognizes insects as part of Europe's protein resilience strategy, laying the foundations for cheaper, more scalable insect protein. Pet food is emerging as a commercial and nutritional proving ground.

Substantial commercial potential

So far, insect protein has hovered at the edge of the mainstream – celebrated by sustainability advocates, scrutinized by regulators and viewed with curiosity by consumers. The pet food industry ticks a lot of the boxes that could support a breakthrough.

Data from the European Pet Food Industry Federation FEDIAF illustrates the commercial potential: 140 million EU households (equivalent to 49%) own a pet. The industry sells 8.6 million tonnes of pet food products annually, amounting to €29.4 billion (\$33.7B) in sales, and has a 4% annual value growth rate.

Even a modest shift toward insect-based formulations would therefore represent a substantial market opportunity for both the insect protein sector and pet industry players.

Recognition for insect-based proteins

The EU cannot meet its protein resilience goals without diversifying sources. Plant protein remains the primary focus in the EC's roadmap to increase the share of EU-produced crop protein used in animal feed from 25% to 35% by 2035. Nevertheless, the Commission has for the first time officially recognized alternative protein sources – including insects – as part of the solution.

That recognition matters. As German agricultural publication *Agrarzeitung* notes, the Protein Action Plan's acknowledgment of alternative proteins is "progress", even if concrete funding measures remain thin.

It also mentions that the industrial plants needed to produce alternative protein sources could be supported by the European Competitiveness Fund, [▶ SEE NEXT PAGE](#)

alongside investment in research and innovation (R&I) to improve competitiveness. This translates into a window of opportunity for the insect sector to scale up production.

The European Commission Aquafeed and GHG Aquaculture reduction studies go further, proposing the de-risking of private investment, tailored financial support and binding targets – recommendations that echo those of the sector itself.

Strategic lever for protein sovereignty

The International Platform of Insects for Food and Feed (IPIFF) has been urging EU member states to treat insects not merely as an environmental alternative, but as a strategic lever to tackle import dependencies and build a resilient, decentralized protein supply chain. The sector's framing is deliberate; insects are not a niche sustainability experiment, but a matter of European protein sovereignty.

During the Agriculture and Fisheries Council (AGRIFISH) meeting in July 2025, EU agriculture ministers explicitly acknowledged the need for the EC to consider the insect sector's specific contribution to the broader Protein Strategy.

Strong political signal

The Protein Action Plan provides the strongest political signal to date that insects are recognized as a key enabler of circular feed systems.

It states plainly: "With a view to promoting a circular bioeconomy, using former foodstuffs, byproducts and co-products from food production as animal feed supports circular bioeconomy goals by reducing waste, preserving nutrients, and delivering economic and environmental benefits."

It adds: "Circular feed may also involve considering new sources of nutrients for use in animal nutrition, such as protein derived from insects."

***To move into the mainstream,
insect-based pet food must appeal to
the humans who buy it and demonstrably
benefit the animals that eat it.***



Regulatory bottlenecks

However, there are still some regulatory barriers standing in the way of scaling insect-based feed. The EU Greenhouse Gas Reduction Study on Aquaculture, published in June, bluntly states: "Review and adapt food safety and feed marketing regulations to remove bottlenecks."

Another recent piece of EU research, the Aquafeed Study, is similarly direct: "Insect production contributes to the EU's circular economy goals by valorizing organic waste streams. However, regulatory restrictions on permitted substrates limit the full realization of this potential."

Together, these three documents – the Protein Action Plan and the two studies – provide the scientific, economic and political foundation for expanding the use of insect proteins as 'permitted substrates'.

Feed Circularity Catalogue

Additionally, insect farming faces a practical feedstock issue. Insects can be reared on a variety of organic residual streams, transforming low-value byproducts into high-value protein. But current feedstock rules under the Animal By-Products (ABP) Regulation limit this potential.

This is being addressed by a parallel industry-led effort. The EU Feed Circularity Catalogue – developed by the European Feed Manufacturers' Federation (FEFAC), FEDIAF, IPIFF and five other European industry federations – proposes concrete regulatory adjustments to enable the greater use of organic residual streams in animal feed without compromising safety or traceability.

As a major user of rendered and alternative proteins, the pet food sector is well positioned to absorb insect protein as production is ramped up.

The catalogue's proposals to relax feedstock restrictions, harmonize end-of-waste criteria and create a biomass value hierarchy will allow insect producers to scale up using circular inputs. This will close nutrient loops and strengthen the sector's sustainability credentials.

The interplay between the Protein Action Plan's strategic recognition and the EU Feed Circularity Catalogue's practical groundwork creates a more favorable policy environment for insect-based pet food than ever before.

As a major user of rendered and alternative proteins, the pet food sector is naturally positioned to absorb insect protein as production is ramped up. In fact, the industry's scale provides the demand certainty that insect producers need to invest in capacity.

Gauging acceptance by pet parents

To move into the mainstream, however, insect-based pet food must work on two fronts: appealing to the humans who buy it and demonstrably benefiting the animals that eat it.

Consumers – particularly in northern and western Europe – are increasingly receptive to sustainable pet nutrition. The pet food sector has consistently positioned itself as a partner in the circular economy and a natural early adopter of novel proteins.

The nutritional case is strengthening, as shown by 2026 research from Ghent University examining attitudes toward insect-based pet diets. Combining consumer studies with controlled feeding trials in dogs and cats, it explored not only acceptance but also the physiological effects of chitin as a functional fiber.

Across different studies, a significant portion of pet owners express willingness to consider insect-based pet food, with cat owners appearing more receptive.

One survey found 62% of cat owners and 52% of dog owners were positive about insect-based pet food. Of US dog owners, around 9% already purchase insect-based dog food, 25% say they are willing to buy it and 46% "may be open" to it in the future.

The studies suggest that, while nutritional potential and lower environmental impact are well documented, acceptance by pet owners remains insufficiently understood. If this can be positively influenced, the pet sector could make a meaningful contribution to protein resilience strategy. ♦

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A top-down view of two clear petri dishes on a green background. The left dish contains several small, orange, bean-like objects with white sprouts growing from them. The right dish contains a larger, pink, irregularly shaped piece of meat-like material. Both dishes are garnished with small green herbs. The title 'What's holding back cultivated meat?' is overlaid in white text on the left side of the image.

What's holding back cultivated meat?

Early products have certainly generated interest, but supply constraints, regulatory hurdles and the cost of scaling are delaying wider commercial adoption.



Emma Penrod
Contributor
GlobalPETS

Despite successful feeding trials and early demand signals, progress is stalling at some companies that have developed cultivated meat pet foods due to limitations in the supply of their star ingredient or the difficulties of scaling production.

The prospect is there

Figures in the industry say they still see significant potential in cultivated meat – provided it can be produced at scale for a reasonable cost.

“It’s super exciting, super promising, but for it to work I think it needs a lot of funding and a lot of time,” says Dr. Guy Sandelowsky, a veterinarian and co-founder of UK pet food player Omni. “It’s one to watch but for a company like ours that is already selling, for us it felt like too much of a risk at this stage.”

Not ready for retail

Omni launched what it billed as the world’s first cruelty-free complete cat food in April 2024, after it developed a canned food product with cultivated chicken meat. The prototype looked promising, according to Dr. Sandelowsky, but Omni suspended production a few months later when the company realized it would be unable to sustain the product long term.

“The product itself is really exciting, but there just wasn’t the volume,” Dr. Sandelowsky says, noting that a cat food customer would purchase dozens of cans of food each month. “There was just no way any [cultivated meat producer was] going to be able to supply us enough at a price point that made sense for us.

“We were bought into the hype, otherwise we wouldn’t have created a prototype, but then a few months later our experience was that production wasn’t possible.”

Testing the market

Other pet food firms have also trialed cultivated meat products but stopped short of launching them widely. THE PACK offered a limited run of cultivated meat dog treats called Chick Bites at UK pet retailer Pets at Home in February 2025; the treats sold out quickly and are no longer on the market pending expanded production at supplier Meatly, according to Meatly CEO Owen Ensor.

Nasta Petfood also debuted a complete cultivated meat food for dogs called Coolty Meat under its FORZA10 brand at Interzoo 2026 in May. Irache Martinez, Chief Marketing Officer at Nasta, says that since the announcement the company has received inquiries “from all over the world, across Europe, the UK, Asia and even the US, from retailers, distributors and media”.

Coolty Meat is capitalizing on interest with a pilot across four retailers in Spain and four in Portugal.

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Alongside sales data from the pilots, a consumer satisfaction survey will assess why owners make repeat purchases and how they perceive the concept. After this phase, the company plans to expand Coolty Meat to additional European countries in 2027.

Driving demand

Europe remains a strong market for alternative proteins, but BeneMeat has also received inquiries from North America and parts of Asia. By segment, Míčková states that “the strongest demand is consistently coming from the premium and clinical pet nutrition sectors”, particularly from brands focused on specialized veterinary lines and clean-label products positioned around longevity.

“Because it is produced in a strictly closed environment, our cultivated meat ingredient can help eliminate the risk of external contamination. The ingredient is produced with no antibiotics and contains no added hormones,” Míčková explains.

This focus underpinned the partnership with FORZA10, as the brand already targets pets with food intolerances. Its portfolio includes single-protein and single-grain recipes for sensitive dogs.

Feeding trials

Despite his recent experience, Dr. Sandelowsky is still a fan of the cultivated meat concept. Like other pet food manufacturers, he’s primarily interested in the sustainability benefits of reduced meat consumption.

And he views cultivated meat as uniquely able to meet the niche needs of cats – who did seem to enjoy the prototype food Omni developed. He says: “We had a few cats try the product and they loved it, but we didn’t get to the proper large-scale feeding stage.”

Meatly’s Ensor called the quick sellout of Chick Bites a clear sign of demand from consumers. And BeneMeat had a similar experience with its Try & Share Program, which gives participants early access to samples of cultivated meat. Míčková reveals that a dog treat distributed through the program received rave reviews, with 86% of participating users saying they would buy the treats again.

BeneMeat recently collaborated with Ghent University in Belgium on a first-of-its-kind feeding trial in which cats were offered a mousse of either conventional chicken meat or cultivated hamster meat. The hamster meat proved modestly less digestible than the chicken, but possibly more popular. The cats left fewer hamster mousse leftovers – though one of the 10 cats in the trial did outright refuse to eat it.

Evidence gathering

That trial highlighted another interesting aspect of cultivated meat production, according to Federica Bortolazzi, a PhD student at Ghent University and one of the authors of the study.

Cats may eat rodents by instinct, but nobody is raising rodents en masse for inclusion in pet food. Growing the meat in a lab could open up new protein options for picky or sensitive eaters, or for pet owners looking to try something new.

But the results of the study may not be transferable to more widely available cultivated meats, such as cultivated chicken, Bortolazzi explains. And regardless of protein, she notes that there’s still a need for large-scale feeding trials to verify long-term health outcomes before cultivated meat is accepted as a mainstream protein.

Regulatory hurdles

While the research and development behind cultivated meat continues apace, Míčková points out that the regulatory landscape is another matter entirely. “To be completely frank,” she says, “our rapid R&D and technological advancements have significantly outpaced current legislative frameworks.”

BeneMeat has secured regulatory recognition in the EU, which enabled the production of Coolty Meat, while



Growing the meat in a lab could open up new protein options for picky or sensitive eaters, or for pet owners looking to try something new.

Meatly used the UK's recent 'regulatory sandbox' for cultivated meat products to advance approvals there.

"Brexit created an opportunity for the UK to lead in food biotechnology, and the UK took it," Ensor says, describing the Department for Environment, Food & Rural Affairs (DEFRA), Department for Science, Innovation and Technology (DSIT) and Food Standards Agency (FSA) as "genuine pioneers in alternative proteins".

But when it comes to accessing other markets or scaling production globally, Mičková says regulatory delays have become "the primary bottleneck for full market integration".

Dr. Sandelowsky agrees, noting that regulatory hurdles to selling pet food made with cultivated meat were among the reasons why Omni chose to put its plans for a cat food product on hold. But the issue really holding cultivated meat back, he says, is scale.

Racing to scale

Both Meatly and BeneMeat are working to address that problem.

Meatly plans to construct a 20,000-liter bioreactor in London that will enable the company to produce 20-25 tonnes of cultivated meat per month. BeneMeat is pursuing a slightly different strategy. Its long-term plan is to become a technology provider, enabling partners such as pet food manufacturers to cultivate meat at their own facilities.

But to get there requires 'real-world proof of concept', so BeneMeat is currently building a manufacturing facility capable of making 400-600kg of cultivated meat per day to supply pilot projects.

However, Dr. Sandelowsky isn't waiting around – Omni has shifted its focus back to hypoallergenic, plant-based food and treats for dogs with sensitivities. "We need it to get further along for it to be commercially viable," he concludes. ♦

Latest research: sustainability and alternative proteins

BeneMeat

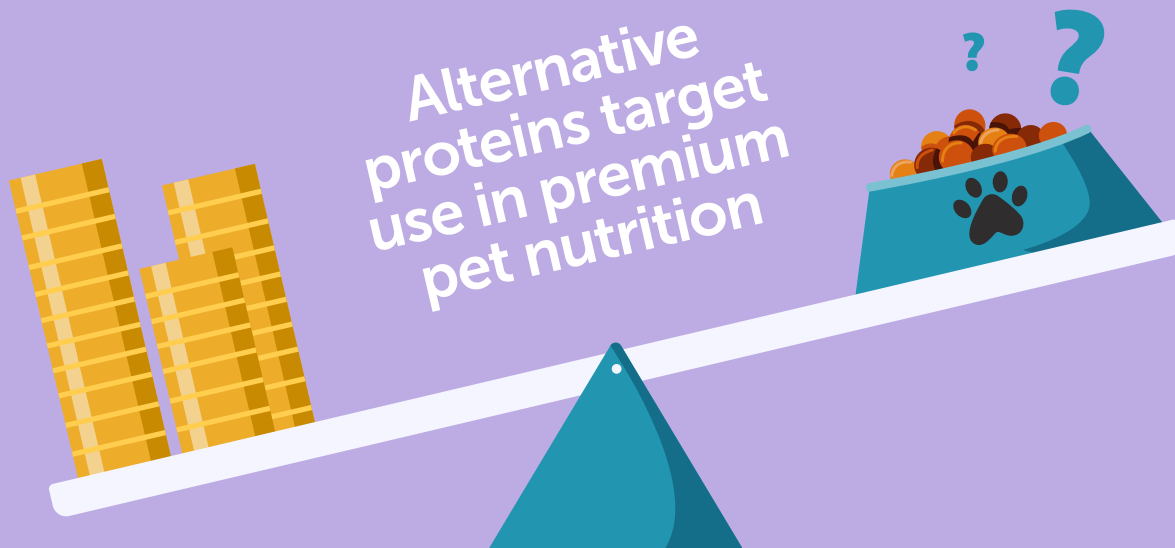
BeneMeat, in collaboration with the Czech Technical University in Prague (CTU), published a life cycle assessment (LCA) study in *The International Journal of Life Cycle Assessment* in April 2026. The results suggest that producing cultivated meat at scale can match or even outperform conventional meat in terms of environmental impact, with outcomes largely depending on the types of inputs used and the energy sources involved.

The study reveals a carbon footprint of 5.3kg CO₂ equivalent per kilogram of product, which is already lower than conventional beef or pork production. With further optimization, this footprint could drop to just 3.3kg CO₂ equivalent, dipping below the emissions of conventional European chicken farming.

Innovafeed

French biotechnology company Innovafeed, in partnership with aquatic contract research organization Onda, also published results in April from two collaborative trials evaluating the performance and functional properties of insect-based ingredients in aquaculture nutrition. The trials, conducted at Onda's aquaculture research facilities at Prince Edward Island, Canada, assessed the potential of BSFL meal to support fish health and performance in Atlantic salmon diets.

The findings showed that an ingredient made from BSFL can inhibit the growth of several bacteria that commonly cause diseases in aquaculture. In a separate trial, Onda evaluated the use of Innovafeed's BSFL meal as an appetite and performance booster in growing Atlantic salmon. Over approximately three months, salmon fed the ingredient grew significantly (from around 300g to 800g) and achieved a 100% survival rate. The fish also showed increased feed intake and improved feed efficiency.



Insect and cultivated meat producers are expanding capacity and testing retail demand, but high costs and uneven consumer uptake continue to present challenges.



Thaís Matos
Senior Business Reporter
GlobalPETS

The world of alternative proteins has seen mixed fortunes in 2026, with major producers of insect and cultivated meat receiving funding to scale production, while other players halted or stopped activities. In this feature, companies in Europe and elsewhere that moved closer to commercial availability this year share how they are overcoming high production costs to reach shelves and bowls by betting on differentiation, health benefits and careful marketing.

Insect-based premium treats

Danish company Globe Buddy expanded its line of treats made with insect protein this year, adding two new products to an existing portfolio of snacks made with black soldier fly larvae, supplied by Protix, and mealworms.

According to CEO and co-founder Bjarne Gravesen Jensen, the decision to increase the offering comes as sales and demand grow. "We are still a small company, so I don't want to make that sound like we are suddenly selling hundreds of tonnes of insect-based snacks," he says. "We are progressing from relatively small initial

sales to more consistent sales across Europe through different channels and markets."

With products distributed either via brick-and-mortar retail or online channels on the continent, Jensen says demand is strongest in Germany, France and increasingly Italy. "Germany is interesting because there is already a degree of awareness around insect protein. In France, both retailers and dog owners are surprisingly open-minded about insect protein, and we are actively developing our retail presence in the market," he says.

The producer is starting to build distribution in other parts of Europe, including Poland and, most recently, the Baltic countries, with a partnership to introduce the products in Lithuania, Latvia and Estonia. "We are also seeing some interest through veterinary retail, particularly where nutrition, sensitivities and functionality are part of the conversation," he adds.

Increased production capacity

In June, the producer of functional and sustainable insect-based ingredients Innovafeed received a €51 million (\$58.6M) funding round to invest in the commercial development of its product ranges, among other projects.

"At the moment, we are talking with a lot of new clients where we want to move forward in Europe and North America. In the Asian region, we are starting up the first discussions," Roel Boersma, Product Strategy & Marketing Director, says.

The company is ready to produce 15,000 tonnes of ingredients in its facility in Nesle, northern France, he explains, which has the potential to be extended.

Europe is still the frontrunner in demand, especially in Germany, the Netherlands, Belgium and France. The company also has clients performing well in the US and Canada, it says, highlighting Jiminy's, a US-based dog food brand producing dry food and treats.

While dry kibble is still the largest type of food among its clients, the company is developing new products for wet food, especially cans and pouches. Apart from protein, its insect-based oils are being applied to flea and tick prevention in partnership with players in Germany.

Australia's first lab-grown pet brand

Australian company Magic Valley produces cultivated meat and decided to launch its own dog treats brand, Unruly, in March, less than one year after cell-cultured foods were regulated in the country in June 2025.

CEO Paul Bevan tells PETS International that the manufacturer is currently producing at pilot-commercial scale, with capacity sufficient to support limited Unruly product drops while testing consumer acceptance.

"At this stage, we have deliberately kept production relatively lean while validating customer demand, refining the manufacturing process and preparing for the next phase of scale-up," Bevan says.

Early signs are positive. "Demand is now beginning to outpace our current production capacity, so increasing supply is a major priority for us," he adds. The near-term expansion aims to reach 2,000-liter bioreactor production of cultivated protein and is expected to require around \$0.35 million (€0.3M) in additional investment.

The product – treats made with cultivated pork – is currently sold directly to consumers and has surpassed

Producers want to move away from the 'niche product' label and compete for the demand for functional, health-oriented nutrition.

1,000 orders since the launch. "That has allowed us to build a direct relationship with early customers and gather feedback quickly," Bevan explains. Retail penetration is part of the company's longer-term strategy, following production lift.

Costs and pricing challenges

Costs are among the challenges in this industry. Magic Valley's CEO says that many of the inputs, processes and equipment needed to develop cultivated ingredients have been designed for pharmaceutical or research applications rather than high-volume food production.

Improving cell productivity, reducing the cost of the nutrients used to grow the cells and increasing the efficiency of the overall production process will be essential in lowering costs, he explains.

Whether for protein manufacturers or their customers, costs that are higher than those of traditional protein pose a challenge – but one can be turned into an advantage. Globe Buddy says that alternative protein is not a cheaper substitute – it's a premium ingredient around which higher-end products can be built. "We will never be a commodity. So, it will always be a more expensive product," Innovafeed's Director adds.

Winning by functionality

Producers aim to gain share by pivoting the focus from the ingredients themselves to their benefits. They want to move away from the 'niche product' label and compete for the demand for functional, health-oriented nutrition. "The technology might attract someone's attention initially but repeat purchasing will ultimately come down to the same things that matter across the pet food industry: nutrition, palatability, trust, convenience and value," Bevan says.

Safety and palatability are also issues because owners are worried about whether their pets will like the food and if it's safe for them to consume it. "Alternative protein and sustainability can be part

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of the reason for choosing a product, but for many owners the first questions are much more personal: Is it suitable for my dog? Is it easily digestible? Does it fit with particular sensitivities? And, very simply, will my dog actually eat it?" Globe Buddy's Jensen says.

This is leading to a move toward functionality. Globe Buddy has developed options with amino acid and roots with calming effects for stress relief; electrolytes and minerals to support hydration and energy recovery; and collagen, microalgae and *lactobacillus* to improve skin and coat and immunity health.

Innovafeed also started to work around the functionality of its ingredients at the beginning of this year, such as the antimicrobial properties of peptides. According to Boersma, pet food brands are interested in benefits, such as hypoallergenic qualities or skin and coat health.

Regulatory considerations

Regulatory endorsement is unlocking in the UK. In 2026, the Food Standards Agency (FSA) has approved five novel food applications and is running a two-year program to "facilitate extensive dialogue with industry to gather learning about cell-cultivated products (CCPs)".

In May, the Colorado-based biotech company Bond Pet Foods received a No-Objection Letter from the US Food and Drug Administration (USDA) for its brewed lamb protein (also known as lamb protein yeast), developed in partnership with Hill's Pet Nutrition, a subsidiary of Colgate-Palmolive. The process of precision fermentation uses microorganisms, such as yeast, bacteria or fungi, to produce specific proteins.

Approved for use in dog food

The USDA status enables the companies to offer the ingredient for use in food formulations for adult dogs, with inclusion levels of up to 15% in the end product. They have already produced over 25 tonnes at commercial scale.

"[The No-Objection Letter] provides important regulatory clarity and gives customers and partners confidence in [brewed lamb protein's] safety and efficacy as they move through their own applications development and material evaluation," a Bond spokesperson says.

Consumer acceptance

There is little updated material on consumer acceptance of or preferences for novel proteins in Europe. A survey of 8,823 dog and cat owners in German-speaking countries published in May 2026 showed that insect-based dry food was the daily choice of 3.17% of dog owners, while insect-based wet food was chosen by 1.59% for daily feeding.

However, the survey was conducted from August to December 2023, and so does not offer any insights into how habits may have evolved over the past three years.

A still precarious market

Despite progress, uncertainty remains a factor in this nascent market. Companies such as Innovafeed and Beta Bugs, a biotech firm producing insect strains, have received funding in 2026. And in April, German manufacturer Symrise made a strategic equity investment in Bond Pet Foods with a view to combining Bond's fermentation platform with Symrise's pet food ingredients and applications. However, the industry also saw setbacks.

The most recent example is FarmInsect, a Munich-based insect technology company, which ceased activities this September.

Chief Operating Officer Wolfgang Westermeier said that while the company "drove the unit economics close to fishmeal parity", bankruptcy was caused by "not yet enough demand at a price that could sustain our production, and building a physical, biological business takes longer than the funding timelines our sector was working with".

For Innovafeed, such cases are inherent to market under-development, but they do not mean the project is compromised. "When you look back at new industries, there will always be companies who go bankrupt. But there will also be some companies who will command commitments and move on," Boersma concludes. ♦

Safety and palatability are issues because owners worry about whether their pets will like the food and if it's safe for them to consume it.

Pets in a powerhouse economy

With the Chinese pet market showing healthy numbers, the government is investing in the sector as one that offers valuable growth opportunities.



Thaís Matos
Senior Business Reporter
GlobalPETS



Diana Dominguez
Business Reporter
GlobalPETS

Urban dog and cat market sales in China reached approximately \$43.4 billion (€38.2B) in 2025, marking a 4.1% year-over-year (YoY) increase – higher than the overall retail sales rise – despite pet population growth slowing to below 2%, according to the 2026 China Pet Industry White Paper.

Premiumization drives sales

The pet market figures also highlight a continued rise in per-pet spending, reflecting the market's transition from volume-led expansion to value-driven growth. Premiumization remains strongest in first-tier and pet-friendly cities such as Beijing, Shanghai, Chengdu and Guangzhou, while consumers in lower-tier markets remain more price-sensitive.

Total retail sales of consumer goods in China also continue to rise, reaching \$7.5 trillion (€6.6T) in 2025. This was, according to the National Bureau of Statistics of China (NBS), a 3.7% YoY increase. Data for the first

half of 2026 gives total retail consumer goods sales of \$4.3 trillion (€3.8T), a further increase of 1.2% YoY.

This data fuels official preliminary estimates of a GDP of \$20.9 trillion (€18.3T) in 2025, an increase of 5% YoY. The tertiary sector (the service and distribution industry, which includes retail) recorded the best performance and growth rate in the country last year, up 5.4% YoY.

Felines at the forefront

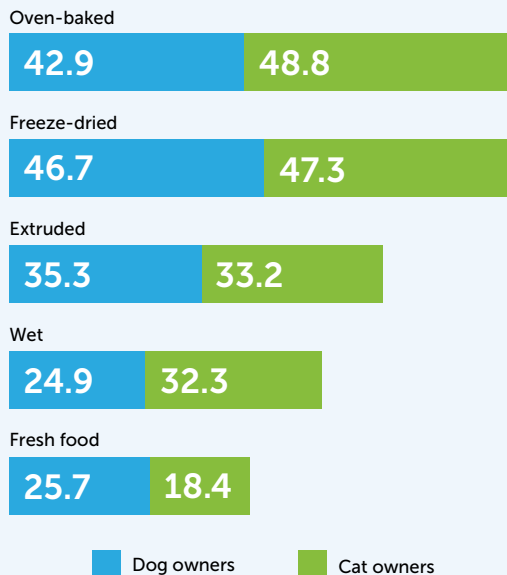
Cats continue to outpace dogs in both population growth and consumer spending. China's urban pet population reached 126 million in 2025, up 2.2 million or 1.8% YoY. The dog population rose by 1.6% YoY to 53.4 million, while the cat population reached 72.9 million, increasing by 1.9% YoY.

Spending grew across both market segments. The White Paper reports an annual increase of 1.5% in spending per urban pet dog, reaching \$448 (€394) in 2025. Annual spending per cat was \$311 (€273), up 3.2% YoY.

The overall Chinese market in 2025 was led by convenience stores (5.5%), supermarkets (4.3%), specialty stores (2.6%) and department stores (0.1%), proving the strength of formats that offer proximity and utility. Sales at brand-exclusive stores, on the other hand, fell by 0.6% YoY.

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Top 5 pet food purchases in China in 2025 (by type, in %)



Source: 2026 China Pet Industry White Paper

The H1 figures for 2026 show some interesting differences in the growth of channel sales compared to last year. Convenience stores, for example, are up by 6.1% YoY, supermarkets by 3.8% and specialty stores by 1.8%. Sales in department stores have gone up by 2.4%, and brand-exclusive store sales seem to have picked up a lot, with a substantial 9.3% rise YoY.

Annual online retail sales reached \$2.4 trillion (€2.1T) in 2025, which represents a strong 8.6% YoY growth. NBS reports that physical goods accounted for 82% of online sales during the year, and that this was driven by food, clothing and daily necessities.

Pet parents more likely to buy online

Sory Park, Project & Content Manager at market research company Daxue Consulting, tells PETS International that online channels are dominant in

Brick-and-mortar options are still relevant for reaching the Chinese pet owner, especially in a discovery phase.

the pet segment. According to KPMG's 2025 China Pet Industry Market report, 68.1% of pet owners prefer online channels when purchasing products, including pet food.

Suki Tan, Account Executive at market research provider Kantar Worldpanel, points out that the importance of e-commerce in the pet food market significantly exceeds the FMCG industry average. As a comparison, while almost seven in 10 pet owners buy products and food online, only three in 10 consumers make online purchases overall.

Promotions and trials

Tan believes that online has become the first choice for consumers thanks to the convenience of home delivery, diverse product offerings and the numerous promotions available. "Data from 2024 shows that Chinese pet e-commerce has a promotion index of 117," she explains. That means the share of discounted products online is 17% higher than the average in the whole omnichannel chain.

The Account Executive also highlights the role of e-commerce in allowing producers to try new formats. "It serves as a critical platform for brands looking to launch trial-sized packs, especially in the dry pet food category, where the e-commerce sales volume share of trial packs is significantly higher than offline." For instance, sales of packs smaller than 200g are 17% higher for cat food and 8% higher for dog food compared to other channels.

The role of physical stores

Brick-and-mortar options are still relevant for reaching the Chinese pet owner, especially in a discovery phase. "Convenience stores, supermarkets and specialty stores complement online. These offline channels remain important, largely due to the high-trust and service-based offerings that online can't fully provide," Park says. She notes that pet retailers providing services like grooming, medical care and boarding can justify assortments with fewer SKUs and higher price points than online channels.

Kantar data shows that offline channels represent less than 30% of total outlet value share. "Within the offline landscape, it is pet stores, pet hospitals

and supermarkets that serve as the dominant retail channels,” Tan states. This type of retail also serves a purpose in attending to immediate needs.

Smaller sizes and premium

According to Kantar, this is backed up by the sales performance of sub-2kg product sizes – which usually fulfill short-term requirements. These have a 10% higher share of cat food sales and a 27% higher share of dog food offline, in comparison to the omnichannel average.

Chris Li, Global Marketing Director at China Great Wall International Exhibition, says that while pet specialty stores and veterinary clinics drive the growth of premium staple food, functional nutrition products and higher-value pet supplies, it is instant retail and online-to-offline integrated formats that are expanding rapidly for daily consumer products.

According to the US Department of Agriculture Foreign Agricultural Service report, China: Pet Food Market Update 2026, food is still the largest segment within

China’s pet care market, accounting for 53.7% of total spending. This is driven by rising demand for food, treats and other nutritional products.

Pet consumers are now showing a stronger preference for poultry-based recipes and high-quality protein sources. Both cat and dog owners are more interested in freeze-dried, baked and fresh products, while among dog owners there is also demand for wet staple diets, with fresh food and wet staple products recording the fastest growth.

Cat owners increasingly favor air-dried products, while baked diets and fresh food remain the fastest-growing categories in this group. The trend is driven by perceived benefits, which include improved nutrition, digestibility and palatability – particularly a factor among younger urban pet owners.

Market dynamics and import costs

Last year, the Customs Tariff Commission of the State Council announced that China had increased the

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martien@wanpy.eu

import tariff on retail packaged pet food, including dog and cat food, from 4% to 10% under the MFN (most favored nation) provisional tariff rate, applying the measure to all countries of origin.

The tariff hike, combined with higher logistics expenses and currency fluctuations, has put further cost pressure on imported pet food and prompted price-sensitive consumers to shift toward domestic alternatives. This has created additional opportunities for Chinese brands to gain market share in categories traditionally dominated by imports.

Foreign brands priced above \$16.70 (€14.70) per kg continue to dominate the premium segment, particularly among higher-income pet owners. Meanwhile, domestic brands are leading the mid-priced segment, with products ranging from \$4.20 (€3.69) to \$8.30 (€7.29) per kg, according to data from the US Agricultural Trade Office in Shanghai.

Concerted development efforts

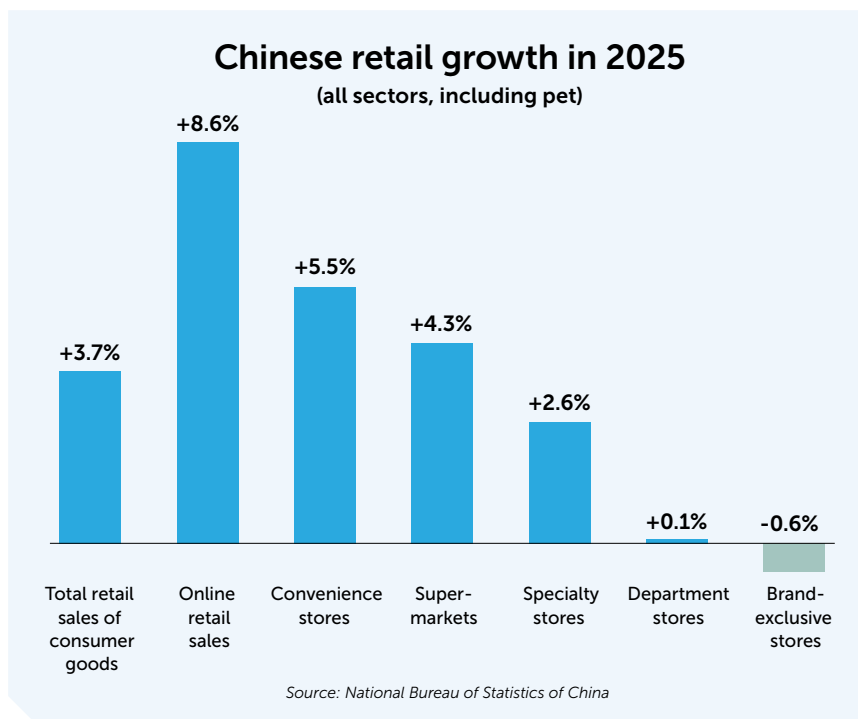
The Chinese government sees the pet segment as a key sector for development. In November 2025, the Ministry of Industry and Information Technology,

alongside five other government departments, unveiled a “comprehensive plan to improve the alignment of the supply and demand of consumer goods”, as an attempt to “tap the potential of its super-large market and provide sustained momentum”, according to the government press release at the time.

The plan defines investments to foster new consumption sectors, promote consumer goods in rural areas and increase the supply of certain goods in the Chinese market. Apart from the total amount of \$440 billion (€390B) to be allocated to segments such as elderly care products and consumer electronics, the government will invest \$14.9 billion (€13.1B) in categories that include pet food and products.

Consumer behavior will also be a key driver for the country in the coming years. The government approved its 15th Five-Year Plan for National Economic and Social Development in March, a document that establishes guidelines for the period from 2026 to 2030.

This plan emphasizes China’s economic goal of expanding domestic demand to increase consumer spending. ♦





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China opens gateway for foreign pet food brands

New rules allow international manufacturers to test demand with less red tape, but long-term success will require broader distribution strategies.



Thaís Matos
Senior Business Reporter
GlobalPETS

Regulations introduced for pet food sales in June 2026 have created fresh opportunities for companies seeking to expand in the Chinese market. The Cross-Border E-Commerce (CBEC) exemption applies to pet food and supplements, allowing products to be listed on major online marketplaces and offered to shoppers in China.

E-commerce opportunities

The CBEC exemption provides an easier route to market, as domestic imports typically require local packaging, labeling and regulatory approvals, including certifications from the General Administration of Customs of China, as well as the Ministry of Agriculture and Rural Affairs.

Experts point out that the CBEC has been a successful channel for human products for more than a decade, with foreign brands now accounting for more than half of the items sold online. The same marketing strategy is now being increasingly used for pet products, creating new opportunities for global brands, particularly amid the tariff challenges associated with traditional imports.

Peter McMath, Chief Growth Officer at WPIC, an e-commerce and digital marketing agency focused on Asian markets, says of the CBEC: “This allows international brands to bypass local laws by shipping directly to consumers via Chinese free trade zones and bonded warehouses.”

A learning process

While some ingredients still require additional regulatory review – including whey powder and meat, bone, fish and blood meal – mainstream dry food, functional supplements and freeze-dried products are generally eligible for sale through CBEC, subject to applicable requirements.

Fabio Alves da Silva, co-founder and COO of pet care platform Wagtopia, sees the exemption as a “vital test-and-learn runway for foreign brands looking to validate their products in China”. As he explains to PETS International: “It gives brands the flexibility to test their products, read market reactions, and make far better capital investment choices regarding their long-term portfolio and distribution strategy.”

While the measure is particularly beneficial for brands still testing the Chinese market, companies seeking long-term ‘wins’ will need more than

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a CBEC-only strategy. Sory Park, Project and Content Manager at the Chinese firm Daxue Consulting, points out that this is because CBEC sales are limited to selected cross-border online platforms, such as Tmall, JD.com and Douyin.

Pet product sales in China are already heavily concentrated online, and WPIC says that this is a limitation when compared with traditional import routes, which allow brands to access a broader mix of offline and online channels. Chinese consumers are capped at ¥5,000 (\$747/€651) per transaction and ¥26,000 (\$3,882/€3,385) annually across all CBEC purchases.

For Alves, the individual consumer spending limit is, indeed, a challenge. "As an international brand scales up, this consumer ceiling inevitably becomes a bottleneck. Transitioning to a general trade strategy then becomes the optimal path forward, as it unlocks the massive offline market and allows for a true omnichannel presence," he explains.

Building a CBEC presence

WPIC describes the typical CBEC process as entailing three main steps. It starts with SKU reviews to ensure products and ingredients meet requirements, followed by the selection of the right marketplaces, and then the development of an onboarding strategy tailored to each platform, including storefront set-up and product page optimization.

The main challenges are building consumer trust and generating traffic. As brands rely largely on direct-to-consumer online sales, Park believes that internationally recognized premium brands may benefit the most. However, building awareness in China requires significant investment. Alves' advice is that "brands must be prepared to pour massive budgets into livestream e-commerce and local influencer seeding".

Growth categories

Pet supplements, functional health products and other niche premium categories have strong growth potential through CBEC. "Historically, these complex formulas faced a regulatory nightmare. CBEC gives them a massive shortcut to launch without that red tape," Alves explains. The country's pet supplements

market is believed to have reached \$560 million (€488M) in revenue in 2025, growing 22% year on year, compared to 4.1% for the overall pet market.

Looking at the broader human supplements market, WPIC data shows that more than 56% of Chinese consumers buy foreign brands rather than domestic ones. The same preference could create opportunities for international pet brands entering China through CBEC. And according to Park, Chinese brands are known for being more affordable, so while local companies are increasingly recognized for their quality, foreign brands are still often associated with premium quality.

China-US relations

The trade facilitation can help strengthen ties between US producers and Chinese consumers. It comes after a difficult year, as new tariffs and trade barriers have created additional challenges for exporters seeking to maintain access to this market.

A report published in April by the US Department of Agriculture shows that the country remained China's largest pet food supplier in 2025. But export values had declined by 17% year on year.

US trade association the Pet Food Institute (PFI) describes the decline as a normalization following the 2022 post-Covid boom. According to the PFI: "We've seen a back and forth of higher and lower export value to China since then. But demand for US products has been consistent, and expanded outside of the established, first-tier cities like Shanghai and Beijing to the smaller, second and third-tier cities."

Strategies for future success

Last year, China approved 477 imported pet food products (including single feed ingredients and feed additives) for entry into the domestic market. This compares to 581 in 2024, according to Daxue Consulting.

Although CBEC creates a more agile and less costly entry point for foreign pet food brands, industry experts agree that long-term success in China will depend on building more efficient omnichannel strategies and attracting local engagement. ♦

Yan Jinsheng, founder and Chairman, Favor Pets

“More than 90% of new customers engage with us online first”

The Chinese pet retailer is using digital customer acquisition to drive traffic to physical stores, as services now account for much of its business.



David Palacios Rubio
Editor-in-Chief
GlobalPETS



Jian Feng
Contributor
GlobalPETS

China's pet retail market is becoming increasingly competitive as e-commerce takes a larger slice of sales and consumers place greater emphasis on health, services and personalized care.

Favor Pets has responded by evolving from a product-led retail model into a broader pet care business. The company is expanding its sixth-generation 'smart store' concept, using AI-enabled health assessments and automated grooming equipment, while also targeting lower-tier cities, fresh food and the growing cat segment.

Favor Pets founder and Chairman shares with PETS International how the pet retailer is adapting its store model and growth strategy to changing consumer demand in China.

How has Favor Pets changed over the past decade and what has driven its growth?

When we first started, we focused on stores and building a strong pet product supply chain. That reflected the demand of China's pet market at the time. Now Favor Pets works with a range of third-party brands, such as Myfoodie [a Chinese nutrition-focused pet food brand], while our own private label products account for around 10% of our retail sales.

As the market has grown, we've moved toward what we call 'technology-driven profitability', with tech playing a larger role alongside the supply chain. More recently, the focus has shifted again, to customer acquisition, including the use of digital marketing and livestreaming.

How is technology improving service quality and efficiency?

We've introduced a 16-point in-store health check, an 18-step standardized grooming process, AI-powered four-spectrum skin and coat assessment, and automated washing and grooming equipment. This equipment allows one employee to serve more than 30 pets a day, increasing labor productivity to around four times that of traditional methods, while reducing grooming consumables by 35%. The advanced technology has earned clients' trust to visit the store for services, which drives revenue. [▶ SEE NEXT PAGE](#)





How have changing pet ownership trends shaped your business?

Our business mix has changed with consumer demand. In the beginning, dogs were the main category and more than 90% of Favor Pets' business was dog related. As cat ownership has increased and spending on cats risen, our model has shifted. We launched a separate cat-focused brand in 2017 and gradually separated cats and dogs into two distinct business lines. We have continued to adjust according to what consumers want. Nowadays, dogs account for around 70% of the business and cats around 30%.

What are the considerations when deciding where to open new stores?

Our first phase of expansion focused mainly on first- and second-tier cities. We gradually moved into third-tier markets more recently. Going forward, county-level markets and other lower-tier areas will become a bigger focus for us. We see opportunities in growing consumer demand in rural areas, and we want to support people who return to their hometowns to start businesses. More importantly, government policy is also supporting business expansion into lower-tier cities.

In 2026, China's Ministry of Commerce and eight other government departments called for chain businesses to accelerate their expansion into lower-tier markets. Favor Pets already has a presence in lower-tier markets such as Handan in Hebei province, where one franchise store has operated for around a decade. This shows how specialized grooming and pet training services can support growth in third-tier cities.

Around 70% of our stores are in lower-tier cities. Rents and labor costs are lower in these areas, competition is less intense and demand for pet-related spending is growing quickly. As a result, franchisees can have greater profit potential in these markets.

For franchisees in county-level markets, we are developing a support package covering financing,

technology, training and customer acquisition.

These markets will be an important area of expansion, although we will continue to develop our presence in first- and second-tier cities as well.

How does your franchise model work?

The majority of our stores are franchised outlets. Favor Pets' core model combines education and retail franchising. Our headquarters provide training, technology, brand support and other resources, while franchisees are responsible for day-to-day store operations.

What is the typical size of a Favor Pets store?

We have three main store formats. Our small stores are around 60sq m and are mainly located in lower-tier cities and residential communities, serving customers within a radius of around one to two kilometers. Our standard stores are around 100sq m and are typically located in key commercial areas of first-tier cities. This is our most common store format.

Our flagship stores are around 200-300sq m and are mainly located in provincial capitals, offering services such as pet spa treatments and health and rehabilitation care. We generally do not operate stores of more than 500sq m because pet services rely heavily on frequent, neighborhood-based consumption. Very large stores would increase rental and staffing costs and could ultimately reduce sales efficiency per square meter.

Which categories are growing fastest?

Consumers in China are becoming much more aware of their pets' health. As a result, we are seeing growing demand in products such as baked pet food and freshly prepared food for cats and dogs.

For Favor Pets, fresh food is one of the fastest-growing categories, with average annual growth of more than 30%. The main driver is a shift in how pet owners think about feeding their pets, moving from simply making sure their pets are full to focusing more on healthier and fresher food.

At the same time, more traditional categories such as dry and puffed food are getting less popular. In the cat category, products such as wet food, canned food and treats are growing particularly quickly.

We are also putting more emphasis on preventive care and everyday health management. We have developed what we describe as a five-part health framework, covering eye, ear, oral, digestive and coat health.

Consumers have responded positively to our approach, and we think health-focused products and services will continue driving growth in the future Chinese pet market.

With the Chinese economy slowing down compared with previous decades, are customers becoming more price-sensitive?

We have not seen a particularly obvious shift toward lower spending among our own customers. If anything, I feel some are spending even more on their pets' health.

However, customers behave differently when using physical pet stores and online shops. In our stores, we provide a free 16-point basic health check. This can help identify issues that owners may not have noticed previously.

Based on that assessment, we can recommend products or services that better suit the individual pet, which builds trust because the recommendation is tied to a specific need, rather than simply selling a product. This includes diet, nutrition, supplements, treats and toys.

For many owners, an additional \$7, for instance, is not enough to make them compromise on their pet's food. They often see their pets as part of the family, and they are willing to spend a little more if they believe it will improve the pet's health.

How has e-commerce reshaped the role of your physical stores?

Five years ago, around 80% of our business came from offline channels and 20% from online channels. Today, the split is approximately half and half. At the same time, we know that more than 90% of new customers first discover or engage with our stores online before visiting a physical location. Our aim is to convert these customers into repeat customers through our in-store services and experience.

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Our business mix has therefore changed significantly. In the past, product sales could account for 70% to 80% of the business. Today, services can account for around 60% to 70%. That is why services have become much more important for physical stores.

If you look only at in-store transaction value, it may seem like consumers are buying fewer products. But that does not necessarily mean they are spending less on their pets. In many cases, they are simply buying those products through other channels or from other brands.

You launched your sixth-generation store model in 2025. How does it use technology to enhance the in-store experience and services?

One area we are developing is what we call our rehabilitation center. It sits somewhere between a traditional pet shop and an animal hospital or clinic, with a stronger focus on everyday pet health.

This is also part of our smart store concept. One element is using smarter in-store tools. For example, we have introduced AI-enabled coat and skin assessment equipment. Rather than relying only on visual inspection or more traditional methods, the equipment can help assess a pet's condition and identify potential health issues or areas that need attention.

This provides a more precise basis for understanding the pet's condition and deciding which services may be appropriate. Meanwhile, we also apply AI to enhance our workflow such as in customer support.

Fresh food cooking is another area where we are using technology. We have in-store equipment that lets staff add fresh meat, vegetables and fruit to produce a freshly prepared meal in around 40 to 50 minutes. But the preparation starts before we make the food – we first assess the pet's nutritional needs.

We currently have more than 100 recipes and, based on the assessment, we can provide a nutritional recommendation and a suitable recipe. That allows us

“We have developed a five-part health framework, covering areas such as eye, ear, oral, digestive and coat health.”



to offer much greater variety for both dogs and cats, while also making the food more personalized.

Where do you see the biggest opportunities for growth?

We have a very long-term vision. Our mission is promoting love and peace between people and animals, and that has remained consistent since the company was founded.

That said, we always follow government policies, and our business model has already evolved several times, from supply-chain support and store development to technology and then to customer acquisition and traffic distribution. We adjust our strategy to market changes and, more importantly, changes in consumer demand.

Firstly, we want to expand our sixth-generation smart store model, combining AI-enabled equipment with data-driven store operations. Secondly, we will expand our presence in lower-tier cities across China.

Thirdly, we want to grow fresh food and our pet health management services – extending our business to broader pet health and wellness. Fourthly, we will embrace AI and smart equipment, which can improve efficiency while reducing operating costs.

Finally, we want to develop our cat-related business, and we are hoping to build it as a second major growth engine for the company. ♦

Three good reasons to exhibit at Zoomark 2027



Zoomark 2027 is over 70% booked and already courting buyers worldwide.

With more than 70% of the exhibition space already confirmed, the halls at BolognaFiere are filling up. In the meantime, Zoomark is already at work bringing international buyers and retailers from all over the world to the show.

Zoomark 2027 will take place at BolognaFiere from 11–13 May 2027. The show will be a valuable meeting point for thousands of manufacturers, retailers, distributors, pet shop owners and professionals from the Italian and international pet industry. For Zoomark, the challenge is renewed: ‘connecting minds, shaping futures’.

Meet Italian and international buyers

Supported by ITA/ICE, the Buyer Program will be further expanded in 2027 to bring qualified international buyers to Bologna from specialized retail, grocery retail, e-commerce platforms and wholesale organizations. Selected buyers follow a structured journey, with a dedicated digital platform that allows them to pre-schedule B2B meetings before arriving at the show and an Incoming Team working on the match between product interests and business objectives.

The same work is under way with Italian retail. Through the Retail Labs, the training roadshow launched within the Zoomark Days program, Zoomark meets pet shops, groomers, garden centers and retail chains across the country, from Milan and Rome to Salerno on 19 October and Bari on 9 November, together with CNA and FNT. Attendance is free and every participant receives a free entry ticket to Zoomark 2027.

Seven special areas

The seven special areas allow exhibitors to position themselves precisely. Factory is the reference point for the entire manufacturing supply chain. Alongside Factory are NEXT for start-ups, Atelier for premium pet fashion and design, Pawfect! for grooming, Aqua Project for aquatics, Pet Vision as the observatory for new products and Beyond, the first international B2B area dedicated to memorial care.

The thematic pathways Italian Style, Tech for Future and Greenmark also return, together with partners including the Pet Sustainability Coalition.

Higher attendance, greater opportunities

“The 2027 edition aims to exceed 1,500 exhibitors and welcome over 33,000 highly qualified visitors, building on the +23% growth recorded in the previous edition,” says Pascale Sonvico, Exhibition Manager at Zoomark. The floor plan has been revised to feature the newly integrated Hall 37.

The Hotel & Travel section of the Zoomark website gives access to accommodation agreements and discounted fares with rail operators Italo and Frecciarossa. These offers apply to exhibitors as well.

Space is filling up fast. Book your stand at Zoomark 2027 now. ♦

For more information visit zoomark.it

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The repositioning of private label pet food

Slower growth and a wider gap between economy and premium segments are changing how retailers are formulating and marketing their own brands.



Anastasiya Patsei
Research Analyst
Euromonitor International

Europe's pet food market is still expanding, but its gains are becoming more selective. With volume largely flat, and consumers more circumspect about spending, private label is winning relevance where it can combine affordability with credible quality, nutrition and distinct positioning.

Mature and resilient market

The European pet food market is expected to reach €43.8 billion (\$49.9B) in 2026, up from €41.1 billion (\$46.9B) in 2025, representing growth of around 6.4% at current prices. Looking further ahead, the market is projected to grow at a 2% CAGR in constant 2026 prices between 2026 and 2031, reaching €48 billion (\$55B) by 2031.

This points to a mature but resilient market. A market where future gains are more likely to come from value creation, channel strategy decisions and shifts in consumer choice than from higher pet care product consumption.

Growth is also becoming more balanced across the region. Eastern Europe grew faster than Western Europe in 2025, but this is expected to reverse in 2026, with growth forecast at 4.1% in Eastern Europe versus 7.3% in Western Europe. The shift suggests the

market is moving away from the stronger inflation-led expansion seen in previous years.

Gaining ground in Europe

This relatively modest underlying growth also puts greater emphasis on where and how value is created within the market. Private label continues to gain ground across European food categories but follows a somewhat different trajectory in pet food.

Own-brand products account for around 27% of European staple foods value and 33% of cooking ingredients and meals value, and in both categories they grew faster than the market average in 2026, outpacing overall growth by 0.3 and 0.7 percentage points (pp) respectively.

Pet food follows a different logic. It is being increasingly treated as a health and wellness category rather than as a commodity category. This development makes brand trust and nutritional credentials more important than price alone.

Health and wellness lens

In this environment, private label is becoming a more important part of Europe's pet food industry. Retailer-owned ranges are expanding across different price tiers and channels, reflecting both ongoing price sensitivity and a broader shift in consumer perception. For many pet owners, private label is increasingly seen as a credible choice rather than a compromise.

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That shift is reshaping how such ranges are positioned. Instead of relying only on lower prices, they use improved formulations, clearer claims and stronger packaging. Because pet food is seen through a health and wellness lens, brand trust still carries real weight, so successful ranges lead with quality, nutrition and coherent positioning, treating price as a supporting advantage rather than the main reason to buy.

Sales growth vs market share

Private label accounted for €8 billion (\$9.1B) of European pet food sales in 2025, most of which was dog and cat food – €7.7 billion (\$8.82B). In 2024, total sales of private label pet food were €7.4 billion (\$8.4B). Despite sales growth, market share has slipped slightly – from 19.7% in 2023 to 19.4% in 2025, meaning that private label has grown in value but not as fast as the total pet category.

Western Europe led in private label market share in 2025, with €5.9 billion (\$6.8B) – up from €5.7 billion (\$6.5B) in 2024. But Eastern Europe recorded stronger growth, rising from €1.5 billion (\$1.7B) to €1.8 billion (\$2.1B) in the same year.

Geographical breakdown

Looking at selected European countries gives an idea of how private label growth compares with branded pet food at an individual market level. In Western Europe, Sweden records the largest gap between private label and branded pet food growth, with private label outperforming brands by 12.5 pp. In Greece and Ireland there are also significant gaps, at 6.6 and 5.2 pp respectively.

Eastern Europe shows even wider disparities in some markets. Bulgaria reports the largest gap in the region, with private label growth exceeding branded pet food by 14.1 pp. Poland follows with a 9.1 pp gap, while Slovakia records a more modest 1.8 pp difference in favor of private label.

Polarized markets

The country differences help to explain why private label continues to grow in value across Europe, while its overall market share is only moving gradually. The pattern mirrors other food industries, where private label tends to advance fastest in more price-driven, commoditized categories.

For many pet owners, private label is increasingly seen as a credible choice rather than a compromise.

This is indicative of a wider polarization. Growth is strongest in the economy and premium segments, while the mid-priced tier is under pressure. Private label sits on both sides. Economy ranges remain relevant for households managing spending, while premium private label is gaining ground as retailers improve formulations, packaging, claims and positioning.

In Western Europe, private label accounts for roughly three-quarters of economy cat and dog food value, compared with just 4-5% of the premium tier. In Eastern Europe, economy penetration varies widely, from around 15-25% in Ukraine to 50-80% in Poland, Hungary, Romania and Slovakia.

Premium remains largely brand-led, with private label accounting for less than 10% of value in most cases. Slovakia illustrates this shift: private label already represents around 24.8% of cat food value and continues to gain share by combining competitive pricing with more premium, health-led recipes. Together, these dynamics show how far private label has moved beyond its traditional role, increasingly resembling branded products in presentation and positioning.

Discounters provide affordability

Private label is evolving differently across retail formats, reflecting each channel's competitive strengths. At discounters, affordability remains the starting point, but retailers also need to communicate quality through clear segmentation, recognizable packaging and relevant nutrition claims. Recent activity shows how this model is becoming more sophisticated.

Lidl operates two key private label brands: Orlando for dogs and Coshida for cats. In Spain, it introduced new recipes last year, combining natural ingredients and veterinary-developed recipes with Tetra Recart packaging. The launches added quality and product credibility, while maintaining the value proposition. In Ireland this year, during a Pet Week event, Lidl sold Coshida food with its Zoofari private label pet care range, including accessories, toys and other products.

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In Germany, supermarket chain Kaufland expanded its private label pet food brand K-Carinura range with K-Carinura Naturals, featuring grain-free recipes, transparent ingredients and no additives. All these launches show how retailers are adopting many of the same credibility cues used by established brands (naturalness, functionality and solutions for specific pet needs) while maintaining a value-led positioning.

Spotlighting expertise

Pet specialists take a more premium approach. Perceived as experts in pet care, they can build ranges that compete directly with established brands. Fressnapf | Maxi Zoo, one of Europe's leading pet supplies retailers, operates extensive omnichannel networks and positions exclusive brands such as MultiFit, Premiere and Select Gold across both affordable and super-premium segments, showing how specialists use private label to stretch across price points.

UK giant Pets at Home has adopted the same strategy. The pet specialist sells own brands such as Wainwright's – which covers everyday, sensitive and grain-free nutrition – and AVA, a more specialist range segmented by life stage, breed size and specific nutritional needs.

In Italy, Arcaplanet offers pet consumers its private label range Virtus, which is positioned around high-quality animal protein, low-grain and no-grain recipes,

and formulas that are tailored to factors such as size, life stage and neutering.

Broad online assortments

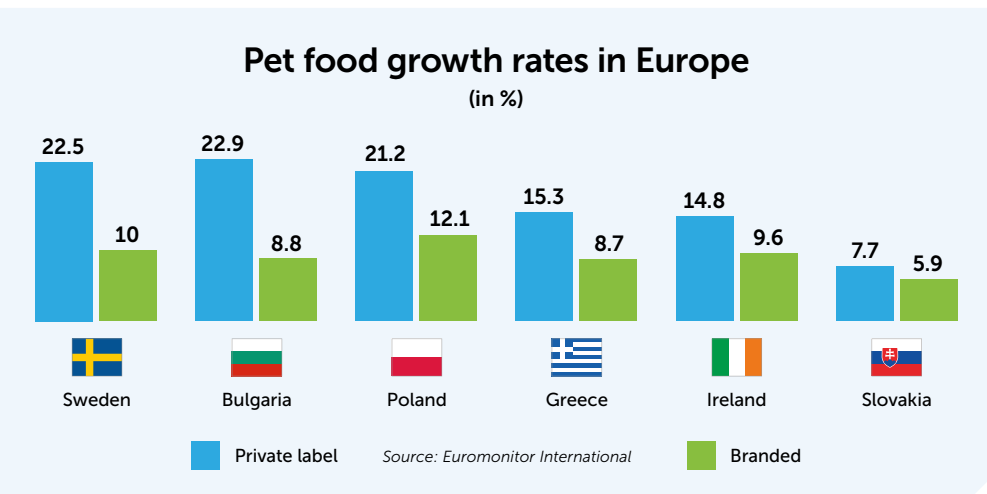
Online specialists are moving in the same direction. Zooplus, one of Europe's leading online pet retailers, now offers more than 20 own brands across cat and dog food, using private label to differentiate its proposition from budget-friendly to premium.

Vertical integration adds a further dimension, as some pet specialists control their assortment, positioning and distribution – making their private label brands part of a broader retail ecosystem rather than simply a range of cheaper products on the shelf.

Where next?

Private label pet food in Europe is entering a more selective stage of growth. Its slight share decline shows that further expansion cannot rely on affordability alone. As the market polarizes, private label has opportunities at both ends: economy ranges can support consumers who are managing budgets, while premium private label will appeal to pet owners seeking health benefits and specialist reassurance.

The most successful ranges will be those that combine price benefits with credible quality, clear positioning and a reason to choose them over established brands – behaving like a brand in specialist retail, and pairing affordability with acceptable quality in discounters. ♦





DANA Technology DENMARK

DANA counter-flow tunnel cuts energy use by up to 30%

Why throw away cooling heat when the next chunks could use it?

DANA Technology has developed a counter-flow concept for its wet pet food tunnel that significantly reduces the energy needed to heat the final chunk product – without changing how the product is cooked.

Energy every hour

A steam-heated or electrically heated tunnel uses significant energy every hour a wet pet food line is in operation. The counter-flow concept lowers that energy use by recovering heat from the cooling stage and using it to preheat the incoming product. DANA's data shows this configuration uses up to 30% less energy than a standard processing tunnel.

How it works

Cooking and cooling still take place on a continuous belt conveyor. DANA controls the air volume and air velocity in the cooling tunnel in relation to the capacity of the machine. This lets the tunnel cool the final chunk product and preheat air in the same step.

After cooking, the cooling air removes heat and moisture from the product. A fan moves this warm air through a separate, insulated pipe that bypasses the cooking zone and leads into a new preheating tunnel, which is connected to the cooking tunnel.

In the preheating tunnel, the warm air flows from the discharge end toward the infeed end, against the direction of the product. The air gives its heat to the colder product before it enters the cooking zone, which then has less heating to do.

What DANA delivers

DANA delivers the Standard Tunnel and the Counter-Flow Tunnel as part of a complete wet pet food line. The line includes feeding pumps, extruders and cutters, followed by either a standard evaporative cooler or the Counter-Flow Cooler Concept. The counter-flow tunnel handles 500–4,000kg per hour, and the technology can be scaled for higher outputs.

About DANA Technology

DANA Technology is based in Tommerup, Denmark. The company designs and manufactures processing machinery for the global wet pet food industry.

Its range has three systems. The first is the DANA Standard Steam Cooking and Evaporative Cooling Tunnel. The second is the DANA Steam and Cooking Tunnel with counter-flow cooling and preheating. The third is the Rotary Disc Texturizer, which processes premium, meat-like texturized products for high-end markets.

The team has more than 150 years of combined experience in food and pet food processing machinery. DANA handles every stage directly, from specification and engineering to commissioning, and adapts each setup to the customer's existing production environment. ♦

DANA Technology ApS
dana-technology.dk

Pet food machinery for smarter production

Automation and AI are driving efficiency as producers seek to reduce emissions and labor costs alongside managing a wider range of product formats.



Thaís Matos
Senior Business Reporter
GlobalPETS

In the past year, several machine manufacturers have launched models that can offer improved precision, speed and safety at different stages of production. Innovations range from advanced extrusion to enhanced cutting and blending.

Next generation extrusion

In May, global leader in processing equipment Bühler Group introduced a new generation of its extrusion systems – the Nutrex 7 Series. Carsten Petry, Head of Market Segment Pet Food at the Swiss company, says the updated version uses a modular concept that can be bundled to serve various applications for premium products, treats and high-flexibility production.

The system is designed around a combination of hygienic design, process stability, integrated intelligence and service. Bühler says the new series has a completely revised, browser-based control system with remote monitoring. The company's strategy is to standardize all machine and plant controls onto a single platform by 2030.

Configuration options

Waukesha Cherry-Burrell is a US company making high-precision, sanitary processing equipment. Product Sales Specialist Steve Bayse says that since receiving feedback from customers in, among others, the pet food industry, it can now offer several configuration options for its scraped surface heat exchanger. These can reduce pressure drop and improve throughput.

"As throughput requirements increase, overall system pressures can grow significantly due to additional heat exchangers and interconnecting piping," Bayse explains. He adds that system pressure can approach the maximum pressure capability of the supply pump, potentially requiring an additional booster pump within the system piping network. The update includes new shafts and connections to support higher flow rates.

Dicing, slicing, blending, bottling...

Meanwhile, FAM STUMABO, a Belgian manufacturer of mechanical equipment for food processing, has launched a trio of cutting machines to meet a full range of applications. The CMD.2 is for dicing chilled and frozen products. The Volantis is used for transverse slicing elongated or pre-formed products, and the Yuran Hytec 300 can dice and also make chunks, strips and pulled-look shreds.

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Manufacturers are looking for greater variety, more premium-looking products and format-specific textures.

The company says this solution is a response to manufacturers' need for greater variety, more premium-looking products and format-specific textures. "Each product behaves differently under the knife, depending on temperature, fat, moisture, salt content, texture and shape," says Sven Boen, Senior Sales Manager Europe.

US manufacturer of industrial processing equipment Munson Machinery has launched a Sanitary Paddle Blender with two intensifiers. The combined action of its paddles and intensifiers produces uniform blends of, for example, dry solid materials. And although not in the machine-making business, Dutch private label pet food producer The Fatory recently introduced nitrogen filling capabilities on its liquid bottling line to better protect oil-based formulations from oxidation.

Categories driving growth

According to Petry, extruded dry pet food remains the core volume driver in the sector, "still representing the majority of staple pet food production globally". But alternative formats such as wet food, baked kibbles, treats and snacks are inspiring innovation. "As a result, pet food manufacturers are investing in equipment that enables the production of premium, differentiated formats, particularly those considered healthier and less processed," he says.

Boen says there's a lot of demand in categories that combine premium nutrition, convenience and visible product quality. "In wet pet food, brands are investing in texture and palatability." And according to The Fatory's Managing Director Bjorn de Bruijn: "In our client base, demand is primarily driven by liquid oil-based pet nutrition products, including salmon and other specialty omega oils such as algae, krill, flax and borage."

Fruitful collaboration

Waukesha Cherry-Burrell's team started its updated heat exchanger design project in late 2024, Bayse says. As part of the development process, the team conducted testing at its Wisconsin facility, which focused on pressure loss reduction.

"Because this project was a direct result of customer feedback, the company had great candidates for field testing. The equipment could be evaluated in real production settings," he explains. The company is still conducting some customer trials for data collection.

To develop its cutting machines, FAM STUMABO also needed to collaborate closely with pet food processors. "It's been an ongoing, application-led process, refined through product trials, customer tests and continuous improvements in the company's test centers and engineering teams," Boen explains.

Today's priorities

In addition to technical demands, pet food producers also look for efficiency and sustainability in new equipment. Bühler says that key priorities include reducing energy consumption and CO₂ emissions, lowering operating costs and increasing overall plant efficiency. The goal is to ensure consistent product quality and greater automation, especially "due to labor shortages and cost pressures".

In practical terms, this leads to orders of energy-efficient dryers, fresh meat inclusion systems, and vacuum coating solutions, Petry adds. Bühler is seeing two types of investment. "In mature markets such as Europe and North America, pet food manufacturers are more likely to invest in upgrading and optimizing existing facilities," he says, "while in growth markets it is about new production lines and capacity expansion."

Creating confidence

Other customer concerns seen, for example, by FAM STUMABO are hygiene, durability and predictable product handling. Producers are also looking for accuracy, repeatability and less product loss.

Natural pet food producer Dr. Harvey's is looking for speed. The US company recently upgraded to a Munson Rotary Batch Mixer because of its faster mixing cycles per batch, replacing a ribbon blender with 57 liters of capacity for a batch mixer of 566 liters.

Media and Technology Coordinator Cesar Salazar says: "When the company moved to a three times larger facility, we needed improved production equipment to keep up with growth. From the four-way action of

the vessel's proprietary mixing flights, the mixer yields blends of grains, dry vegetables, protein powders and other ingredients in about five minutes."

Among oil producers, The Fatory highlights the increasing demand for greater protection from oxygen exposure to maintain freshness, stability and nutritional value throughout a product's shelf life. Its nitrogen filling complements the quality controls incorporated into its recently upgraded bottling line, providing customers with an additional level of confidence in the quality and consistency of the finished product.

Investing in automation

Overall, Bühler expects investments to move from standalone machines to fully integrated systems that combine equipment, automation and digital capabilities.

The manufacturer is embedding AI "by combining advanced automation with data-driven models, enabling process optimization, predictive maintenance,

and working toward self-optimizing, autonomous production systems", Petry says. In practice, this means machines that can analyze production data in real time, detect deviations, recommend adjustments and show when maintenance may be needed.

In The Fatory's recent upgrade, "nitrogen is automatically applied during product storage, bottle preparation, filling and sealing", with pre-established oxygen-reduction measures integrated directly into the production flow, according to de Bruijn. This eliminates a series of steps that would require manual monitoring and adjustment.

All these companies say that equipment development – from design to testing and validation – takes many years of research. Whether through technological resources or the improvement of practical functions, the industry is now moving toward smarter, more sophisticated and versatile machinery to meet an equally diverse demand. ♦



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Powering up for the future

Pet food manufacturers are investing in long-term energy strategies as they pursue price stability and reliable renewables.



Thaís Matos
Senior Business Reporter
GlobalPETS

After peaking in 2022, and declining slightly in more recent years, higher electricity prices are once again at the center of the economic debate as geopolitical tensions have knock-on effects on global gas and energy costs. Many companies are finding alternatives to traditional procurement methods.

Wholesale price volatility

Average wholesale electricity prices in many markets in the world rose in 2025 compared to the previous year. This was partly due to higher natural gas prices translating into higher costs for gas-fired electricity generation, according to data from the International Energy Agency (IEA).

Greater generation of energy, including renewables, adds more supply to the grids, helping wholesale prices to go down. According to the IEA, some regions in Australia even registered negative electricity prices last year, largely due to increases in generated wind energy.

Rising retail energy costs

Whereas wholesale electricity prices are highly volatile, with frequent ups and downs, the costs for consumers – from households to commerce and industry – have steadily increased in the past few years. “While energy-related price components have fallen from crisis highs, they remain above 2019 levels, and non-energy charges such as networks, taxes and fees continue to take up a large share of bills,” the agency reports.

To protect themselves from both constant annual growth and price shocks caused by external events, companies are turning to alternatives such as Power Purchase Agreements (PPAs) or Virtual Power Purchase Agreements (VPPAs) with renewable energy suppliers, or are installing renewable energy systems in their facilities.

This approach reflects a move from short-term price exposure to long-term procurement strategies that combine cost predictability with decarbonization commitments. VPPAs act as a financial price-lock contract instead of delivering physical energy to the factories, allowing companies to hedge against volatile market rates.

Wind farm investments

Companies active in the pet sector have been increasingly investing in wind energy. In 2022, for example, Nestlé Australia entered into a 10-year deal with a wind turbine operator.

And in 2024, animal health company Zoetis signed a virtual 12-year PPA contract with Colorado-based renewable energy operator Scout Clean Energy, for a 50-megawatt (MW) portion of Scout's Heart of Texas Wind Farm.

At the beginning of 2025, Snellman Group, the parent company of Nordic producer Snellman Petfood, entered into a 10-year power agreement with a wind farm in Finland.

"It's a structured PPA set-up, ensuring price stability and access to renewable energy. This allows us to reduce our carbon footprint, while securing a reliable and predictable energy supply for our production," Magnus Pettersson, CEO of Snellman Petfood, tells PETS International.

In its 2025 Sustainability Report, the Snellman Group detailed its company's total electricity consumption at 66,617 MWh, 94% of which was renewable energy. It has also implemented several energy efficiency measures across the group, renewing the ventilation system and making automation changes in its refrigeration unit.

Large corporate PPAs

Since September 2025, Mars has partnered with energy provider Enel North America in a transaction involving the full output of three solar plants in Texas.

"The agreements represent Enel's largest corporate PPA transaction worldwide. Combined, they represent 851 MWAC (megawatt alternating current) and are expected to yield 1.8 terawatt-hours (TWh) of electricity each year," the company says.

This is one of several long-term electricity contracts Mars is implementing. In February, it secured 70% of annual production from the Kolvallen Wind Farm in Sweden.

The agreement will provide approximately 670 gigawatt-hours (GWh) of clean electricity each year, supporting both the company's direct operations and value chain partners.

Additionally, in April, Mars closed another deal in Lithuania, signing a long-term VPPA with European Energy for most of the output from the planned Skuodas Wind Farm. This is expected to generate around 490 GWh of renewable electricity annually.

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The energy should be available by 2028, and will provide a long-term electricity source for its pet food manufacturing facility in the Baltic state. By helping to kickstart the project through a long-term financial commitment, Mars is building on its use of corporate PPAs as a mechanism to support new wind capacity development.

Local renewables

Carry Pet Food is a European private label manufacturer, specializing in high-quality chew treats for dogs. It became part of the VAFO Group in 2020. In August, it took a major step toward greater energy independence when it joined the Poland-based Jawory Energy Cooperative.

By combining the solar power it generates itself with energy supplied by local renewable sources, the company now covers nearly 90% of its electricity demand with green energy. This significantly reduces the plant's dependence on fluctuations in the external electricity market, while increasing production stability and energy security.

For VAFO, investing in locally generated renewable energy contributes to the company's environmental, social and governance commitments, while strengthening the resilience and competitiveness of its manufacturing operations.

Geopolitical events and data centers

Data shows the impact of the geopolitical events of recent years on the energy sector. For instance,

US price increases in 2022 – when the war between Russia and Ukraine began – were 11.4% year on year (YoY), much higher than the second-highest annual increase of 5.3% recorded in 2025. In the EU, this spiked at 52% for households and almost doubled (+91.8%) for non-household consumers when comparing the second halves of 2022 and 2021.

Both wholesale and retail electricity prices are also affected by the increasing adoption of AI and its energy-intensive data centers. This effect is driven by the rapid growth in demand due to intensive computing workloads and cooling needs, which increases peak pressure on power grids.

"Today, electricity consumption from data centers is estimated at around 415 TWh – about 1.5% of global electricity consumption in 2024. It has grown 12% annually over the last five years," says the IEA in its Energy and AI report, published in April 2025. The agency estimates that global electricity consumption for data centers will double by 2030, representing just under 3% of total global electricity demand in that year.

Future grid connection issues

According to the IEA's mid-year update, which was published in July, global electricity demand is forecast to grow by 3.6% in 2026 and 3.8% in 2027. That is driven by rising consumption from industry, appliances, cooling, data centers and wider electrification.

This rising demand will put additional pressure on electricity grids. The IEA estimates that annual grid investment will need to increase from today's approximately \$400 billion (€350B) by around 50% by 2030 in order to meet demand growth, while more than 2,500 GW of planned renewable, storage and large-load projects wait in grid connection queues worldwide.

Renewable generation, grid expansion, storage and greater system flexibility will all play a part in meeting this demand. But the scale of projects waiting for grid connections highlights the infrastructure bottleneck facing electricity systems, as demand from electrification and data centers continues to grow. ♦

EU price fluctuations

According to the IEA's Electricity 2026 report, wholesale electricity prices in the EU increased by approximately 10% YoY in 2025, reaching an average of €84/MWh (\$95) for the 27 countries. Household electricity prices increased 7.5% on average in the second half of 2025 compared to the same period of 2024. In terms of countries, 17 registered higher costs, while the other 10 saw prices fall.

The EU's statistical office Eurostat releases electricity price data biannually. In the second half of 2025, prices for non-household (medium-sized) consumers fell 5.4% YoY to the lowest level since the beginning of 2022. Prices excluding taxes remained broadly stable from 2008 to the first half of 2021, jumped in 2022 and started falling again in the second half of 2023 – although not to the same levels as before the peak.

Strain on US households and businesses

US electricity costs increased by an average of one-third between 2016 and 2025. Over the 10-year period, the largest rise was recorded in residential prices (37.8%), followed by commercial (28.6%) and industrial (27.5%), according to data from the US Energy Information Administration. Additionally, residential energy costs in 2025 were 21% above the decade average, compared to 16% for industrial and commercial consumers.

Until the beginning of June, the US had only released data for the first quarter of 2026. In the 12 months ending in March, industrial prices showed the largest increase (+6.7%), while costs for domestic and commercial consumption rose by 6.5% and 6.1%. These numbers show the constant strain that energy puts on household budgets as well as company finance – a trajectory that shows no signs of slowing down this year.

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Thinking outside the box

Furniture-style designs, multifunctionality and technology are reshaping the market, but manufacturers need to balance innovation with safety and practicality.



Adam England
Contributor
PETS International

The indoor pet enclosure has been almost solely a functional product for decades, used for training, travel or sleep. But as pets have become increasingly integrated into the home, the category is evolving. For manufacturers and retailers, this raises the possibility of competing not only on materials or features, but also on personalization, configuration and the ease with which a crate blends into an owner's living space.

Balancing purpose and style

Data intelligence company Business Research Insights estimates the global dog crates and kennels market at \$2.6 billion (€2.3B) in 2026, rising to \$3.67 billion (€3.22B) by 2035 – representing a projected compound annual growth rate (CAGR) of 3.9%.

This growth is partly being driven by manufacturers looking beyond traditional enclosures and exploring products that blur the lines between purpose, style and even technology. Customization, integrated storage and finishes designed to complement home design are key developments in the category, suggesting that manufacturers are responding to demand for crates that fit seamlessly into homes while also serving additional needs.

Private label opportunities

The shift is also creating new opportunities for retailers to expand their own ranges across pet housing and furniture, giving them greater control over product specifications, positioning and pricing.

For example, US online pet platform Chewy's own brand, Frisco, includes dog crates and other pet housing products. This brings private label presence into a category that has traditionally been dominated by specialist manufacturers, potentially increasing competition for both in-store and online visibility.

From one function to multi-use

Today's consumers are increasingly looking for crates that cater to their practical needs by being simultaneously sturdy and comfortable, while also being stylish enough to blend in with their home decor.

New York-based pet company Fable takes a design-led approach to dog products, aiming to combine functionality with aesthetics. It identifies furniture-style crates as a distinct segment alongside traditional plastic, wire and soft-sided ones.

Its founders worked with industrial design firm Doris Dev to develop a pet crate that addresses a common challenge for urban pet owners: fitting bulky pet equipment into the home. The resulting

crate is designed to function both as a dog enclosure and an end table.

But Fable's approach isn't only cosmetic. Its Signature Crate design process identified the conventional swinging door of a crate as a problem, because it takes up space when it is open. This inspired the company to incorporate a sliding gate that can be stored within the unit when not in use.

Home-friendly designs

A similar shift is notable among newer furniture-focused pet brands. For example, Artisan Paws, based in the US state of Washington, positions its crafted wooden dog crates as furniture, highlighting the side-table function and apartment-friendly design.

Another company considering how the pet crate blends into the home environment is UK-based Lords & Labradors. Its range of covers, cushions and fabric bumpers allows pet owners to turn a crate into a more comfortable and a more visually integrated part of the home.

Private labels are moving into a category that has been dominated by specialists, potentially increasing competition in-store and online.

Customization choices

Meanwhile, the premiumization trend is creating opportunities for greater customization. UK business The Pet Carpenter specializes in bespoke, handmade "pet bedrooms".

The company helps pet owners to make informed choices about design aspects including doors, end panels, bars, feeding drawers and soft furnishings. This enables them to curate their own look in line with their home's style, while creating the perfect space for their pets.

Beautiful does not equal good

The examples above illustrate how the pet crate can make the transition from a functional, off-the-shelf product to a more visually pleasing and [▶ SEE NEXT PAGE](#)

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personalized piece of furniture. However, designing a pet crate with style in mind can bring with it practical constraints. How far can a pet crate move into the furniture category without compromising its primary purpose?

Colorado-based veterinarian Dr. Sarah Wooten says furniture-style crates may encourage owners to keep them in more central areas of the home, but that aesthetics shouldn't come at the expense of function. "A beautiful crate is not automatically a good crate," she explains, highlighting the importance of ventilation, safe materials, secure construction, sufficient space and easy access.

Out-of-home constraints

These factors are not only relevant in the home, but also when the product is intended for on-the-go use. Dr. Matthew Murdoch, another veterinarian – and Director of Asia's leading veterinary surgeon-managed pet travel agency, Ferndale – highlights air travel as one example.

He explains that the International Air Transport Association (IATA) sets minimum requirements for pet crates used during air travel. For instance, the total open, ventilated area must account for at least 16% of the combined surface area of all four sides. The crates may not have holes in the base or wheels underneath. Requirements also apply to the spacing of bars and gaps in grilles, he tells PETS International.

For manufacturers, this means that they may need to balance design features intended to make crates more attractive or multifunctional against usage-specific requirements. According to Dr. Murdoch, if a crate is likely to be used for air travel, practical constraints need to be considered carefully. Otherwise, "a big market is excluded".

Smart crates with built-in monitoring

Technology is emerging as another theme, with smart features such as GPS tracking, remote monitoring and climate control beginning to enter the pet crate category.

For the veterinary sector, Japanese high-tech corporation Asahi Kasei Microdevices (AKM) is exploring camera-free sensing for pet monitoring, such as during post-surgical recovery. At international tech event CES 2026, the company demonstrated a 'smart' cage monitoring system that can alert the vet in the case of irregularities in an animal's vital signs.

The solution is based on the company's millimeter-wave radar technology that detects emergency situations without the use of cameras or wearables.

The limitations of pet tech

The company has identified potential applications for its sensing technologies beyond veterinary practices, including helping owners themselves to monitor pet health. However, the company is not willing to comment further on the technology while it remains under development.

Dr. Wooten agrees that technology can be useful when it helps owners to understand an animal's condition but points out that monitoring should not become a substitute for human care, social interaction or exercise.

Compliance challenges

Business Research Insights identifies safety and quality compliance related to materials, ventilation, design and stability as considerations for both traditional and more innovative crates. And as crates become more sophisticated, manufacturers will also face challenges around product development and technological compliance.

The crate category seems to be moving in several directions at once: toward multifunctionality as furniture, customization to blend with interior design, and also in the direction of technological enhancement. The key to success is to add value without losing sight of the basic principles of what makes a good pet crate: safety, durability, comfort and functionality. ♦

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