PETS International
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NOV 2026

THE SHAPE WE'RE IN

The outlook for the global pet industry



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from tradition — to disruption



zooplus CEO on the future of pet retail

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With a quarter of owners reporting sensitivities in their pets, opportunities are expanding for targeted nutrition and supplements.

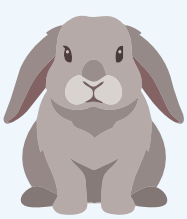


Small but mighty

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As environmental concerns about over-the-counter treatments deepen, how will pet businesses and consumers be affected?



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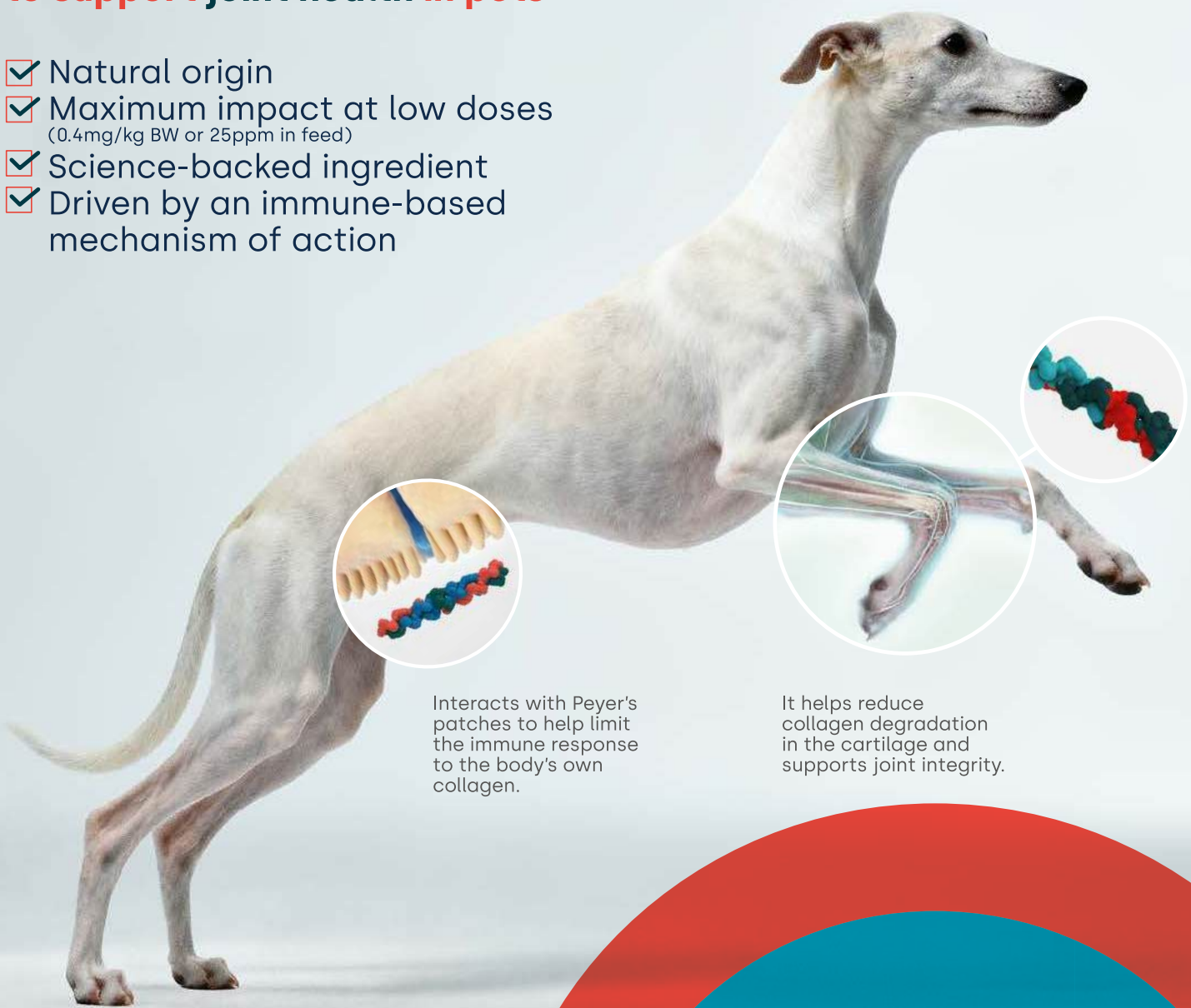
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The competition for growth

The global pet industry is projected to reach $645 billion (€579B) by 2035, with healthcare, premium nutrition and services expected to play increasingly important roles in defining the sector's direction over the next decade.

At the same time, competition is intensifying. E-commerce players are fighting to win customer loyalty, while investments in new therapeutic categories are opening up business opportunities. In our final issue of the year, we explore the latest forecasts and market insights to help you and your business navigate the road ahead.

Pet services are also a critical part of the market, creating new opportunities for businesses to diversify their offerings and build stronger customer relationships.

This month we take a closer look at the grooming category through an analysis of our latest survey, conducted across seven countries, comparing consumer behavior with the findings of our previous wave in 2023. One discovery worth highlighting: 30% of pet owners use professional groomers, with the figure reaching 51% in Brazil and 43% in Mexico. But these numbers raise several other questions. How much are owners willing to spend on grooming, and what are the differences between dog and cat owners? And, will grooming become a bigger part of pet owners' budgets in 2027?

The future of the pet industry – and the strategies businesses will need to ensure the best chance of ongoing success – will be under the spotlight at the GlobalPETS Forum 2027 in January. The event will once again bring together industry leaders to exchange ideas, share experiences and discuss trends, opportunities and challenges.

I look forward to seeing many of you in Lisbon. In the meantime, wishing you an inspiring read.





David Palacios Rubio
Editor-in-Chief

> **Great things are done by a series of small things brought together.**
> VINCENT VAN GOGH, DUTCH POST-IMPRESSIONIST PAINTER

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Pet players team up with sports brands

Companies are increasingly turning to sports partnerships to reach audiences beyond traditional pet retail.

In Europe, Fressnapf has partnered with German ice hockey club Krefeld Pinguine for the 2026/27 season and extended its relationship with handball team HSG Krefeld Niederrhein.

Ukrainian brand WAUDOG, owned by COLLAR Company, has become the official sponsor of FC Chernihiv, launching a co-branded range of pet accessories, while Portuguese producer Sorgal continues to support the youth football program of Associação Desportiva Ovarense Futebol.

Josera is expanding its involvement in international handball, becoming a partner of the 2026 Women's European Handball Championship and an official partner of the 2027 IHF Men's Handball World Championship.

In North America, The Farmer's Dog has signed a multi-year deal to become the NFL's first official pet food partner, while Purina's partnership with U.S. Soccer runs through 2030. Nulo is continuing its four-year agreement with the Canadian Olympic Committee.

TikTok Shop sales boom



According to data analytics platform SmartScout, pet supplies sold through TikTok Shop in the US generated $30.1 million (€26M) in revenue between July and August, representing month-over-month (MoM) growth of 34.5%.

Accessories generated the highest monthly revenue, at $6.7 million (€5.8M), driven by toys and feeding supplies.

In the UK, TikTok Shop pet care sales grew 60% in 2025, with one pet product selling every 15 seconds, according to the platform. Creators are a key driver of this growth, generating £2 million ($2.7M/€2.3M) in commissions last year through product videos. *(Photo credit: Shutterstock / Alex Photo Stock)*

Amazon's first-party pet sales hit new high

First-party vendors account for 23.4% of Amazon's US pet category revenue, generating an average $322 million (€279M) a month, according to data analytics platform SmartScout.

Total pet sales on the platform, including third-party sellers, rose 32.6% over 12 months to August 2026 to around $1.4 billion (€1.2B) monthly. Amazon-owned sales are particularly strong in cat food, at 89% of category revenue, and dog food, at 78.6%.

Third-party brands are growing faster overall, however, at 108% annually versus 34% for first-party brands. Competition is intense in some segments, with more than 2,000 brands selling basic dog collars and over 1,800 competing in dog chew toys.

BARK prepares to exit dog air travel business

The US pet services company has reached a preliminary agreement to sell BARK Air's customer list and license its brand, with the transaction expected to take effect on 1 January 2027.

The decision follows strong customer demand, with average seat utilization of around 90%. However, the service contributed only $3.5 million (€3.1M) – 4% of quarterly revenue.

The firm plans to redirect investment toward its commerce business, partnerships, supply chain and new products.



New players boost Mexican pet retail

Mexico had 42,600 registered pet-related businesses in 2025, up 5.2% from 2023 and 57.2% compared with 2019, according to Mexico's national statistics agency INEGI. Retail accounted for the largest segment, with 17,900 outlets, an increase of 7.3% in two years. Veterinary services followed with 15,900 businesses (+3.5%), while other pet-related services topped 6,500 (+4.6%).

Although smaller in number, animal food manufacturing recorded the fastest growth, rising 8.1% to just over 850 establishments. By contrast, pet accessories and clothing manufacturing grew by just 0.7%, to more than 1,300 businesses.





Pet associations appoint new leaders

Five industry organizations have announced leadership changes. Nicole Paley will succeed Michael Bellingham as CEO of UK Pet Food after 22 years in the role; he will remain a part-time senior advisor until March 2027.

The Pet Sustainability Coalition has appointed Heather Pfahl as CEO and Executive Director. The Pet Food Institute named Wellness Pet Company CEO Reed Howlett as its 2027-2028 Chair, with General Mills' Liz Mascolo as Vice Chair.

The Independent & Neighborhood Pet Retailer Association (IndiePet) has appointed Bill Greene as Executive Director, while Marie Bucko will serve as Interim CEO of the Animal Health Institute following Martha Scott Poindexter's departure.

Fressnapf | Maxi Zoo unifies Benelux operations

The European pet retailer will bring its activities in Belgium, the Netherlands and Luxembourg under one regional structure from 1 January 2027.

The Benelux cluster will cover 144 stores and be led by Belgium Country Manager Giane Van Landuyt, supported by a six-member management board. The move aims to strengthen cooperation in purchasing, marketing and e-commerce, while local teams retain day-to-day responsibilities.

The group expects the structure to create synergies and strengthen supplier relationships. It follows earlier regional integrations in the Alps and Central Europe. Fressnapf | Maxi Zoo reported revenue of €1.9 billion ($2.13B) for the first half of 2026, up 6.9% year over year (YoY).

Supermarkets expand own brand pet ranges

Supermarket chains in Europe are strengthening private label portfolios as the segment gains traction.

German-based Lidl has consolidated its dog and cat products under Max & Mila's World, a three-tier range rolling out across 25 European markets. In the UK, Marks & Spencer (M&S) has introduced Paws & Pals, its own brand food and treat range for cats and dogs. British manufacturer Burgess Pet Care has also launched a white label offer for independent retailers.

Euromonitor data shows private label pet food sales grew fastest in Eastern Europe and North America between 2021 and 2025, while Western Europe remained the largest market.





Cultivated meat set for retail trials

BeneMeat and FORZA10 are testing Coolty Meat, a cultivated meat wet food, with four retailers in Spain and four in Portugal. The pilot will assess sales and consumer satisfaction, with plans to expand into other European markets in 2027.

The companies report positive early palatability tests among dogs. However, consumer perceptions, limited shelf visibility and regulatory uncertainty remain challenges. FORZA10 says more than half of its customers are willing to try the product, although cultivated meat is currently a niche proposition. The trial will provide an early indication of repeat purchase potential and commercial prospects.

Fish oil demand rises but supply tightens

Growing interest in omega-3s for pet health is creating opportunities in pet nutrition, particularly in supplements. However, manufacturers face increasing pressure on marine ingredient supplies.

According to The Marine Ingredients Organisation (IFFO), the pet food sector consumes around 5% of global crude fish oil annually. Meanwhile, the share of fish oil used in industries other than aquaculture and nutraceuticals rose from 9% in 2021 to 20% in 2024, while aquaculture's share fell from 74% to 64%. Fishmeal is also gaining importance in dry pet food, driven by growing recognition of its nutritional value. However, tighter availability is expected to push prices higher.

Companies including US firms Trident Seafoods, Finfare Pet Foods and Vital Pet Life are expanding their fish-oil-based offerings, responding to demand for preventive health products and greater ingredient transparency.

Meanwhile, some suppliers are exploring alternatives. In April 2026, Swiss-Dutch company dsm-firmenich launched an algae-based oil designed to deliver the same natural EPA:DHA ratio as fish oil.



PET INDUSTRY FACT FILE

NEW APPOINTMENTS

Swedencare

Kristy Murphy, Chief Revenue Officer, is the new Interim CEO of pet supplement brand NaturVet.

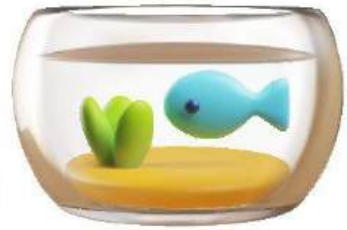
Partner in Pet Food

The Hungarian private label pet food manufacturer has appointed Matthew Austin as its new CEO.

Corbion

CEO Olivier Rigaud will not seek a third term as CEO of the Dutch food and biochemicals company when his current contract ends on 12 May 2027.







DATA INSIGHT

54%

of customers trust advertised discounts during major sales events, while one in five actively distrusts them, according to Boston Consulting Group's November 2026 consumer study.











TOP 3 INVESTMENTS

1. Thai pet food manufacturer i-Tail Corporation has acquired Illinois-based pet treat maker **Phelps Pet Products** for an enterprise value of $160 million (€139M).
2. **Canina Pharma**, a German manufacturer of pet health supplements and pet care products, is investing €5.6 million ($6.5M) to expand its site at Hamm-Rhynern.
3. UK-based investment firm BGF has acquired a minority stake in **Monkfield Reptile**, a specialist supplier of reptile nutrition.







TOP WEB NEWS

Gen Z to boomers

How each generation is reshaping pet spending habits.

LATEST NEWS

Where next for the global pet economy?

Europe is shaping up to narrow its spending gap with the US as healthcare, premium nutrition and e-commerce are set to drive future developments.



Diana Rosero-Pena
Equity Research Analyst
Bloomberg Intelligence



Ann-Hunter van Kirk
Senior Equity Research Analyst
Bloomberg Intelligence



It has been two years since Bloomberg Intelligence (BI) projected that the industry would reach $500 billion (€446B) by 2030, and the trajectory of the sector continues to evolve. Spending per pet should become increasingly important as ownership levels normalize.

Further expansion through 2035

BI's latest scenario forecasts industry sales rising from approximately $407 billion (€363B) in 2026 to $506 billion (€451B) in 2030 and $645 billion (€579B) by 2035. This represents annual growth of around 5% over the period. The source of that growth is shifting. The pandemic produced a surge in pet ownership – particularly in the US and Europe – but this has since slowed down.

Over the next decade, spending more on each pet should become a bigger driver of industry growth than simply adding more pets. Longer lifespans, increased healthcare needs, premium and functional nutrition, and continued migration toward online retail are expanding the amount households spend over a pet's lifetime.

Untapped European potential

Europe should continue to represent roughly one third of the global pet economy, even as the region's pet population grows only modestly. BI's scenario points to sales in the region rising from about $140 billion (€125B) in 2026 to $172 billion (€153B) in 2030 and $212 billion (€189B) by 2035.

European households still spend substantially less per pet than US ones, leaving room for growth as owners move toward more sophisticated nutrition, preventive healthcare, diagnostics and other recurring services. The opportunity therefore lies more in deepening relationships with the existing companion animal population than relying on another surge in pet adoptions.

How much room is there?

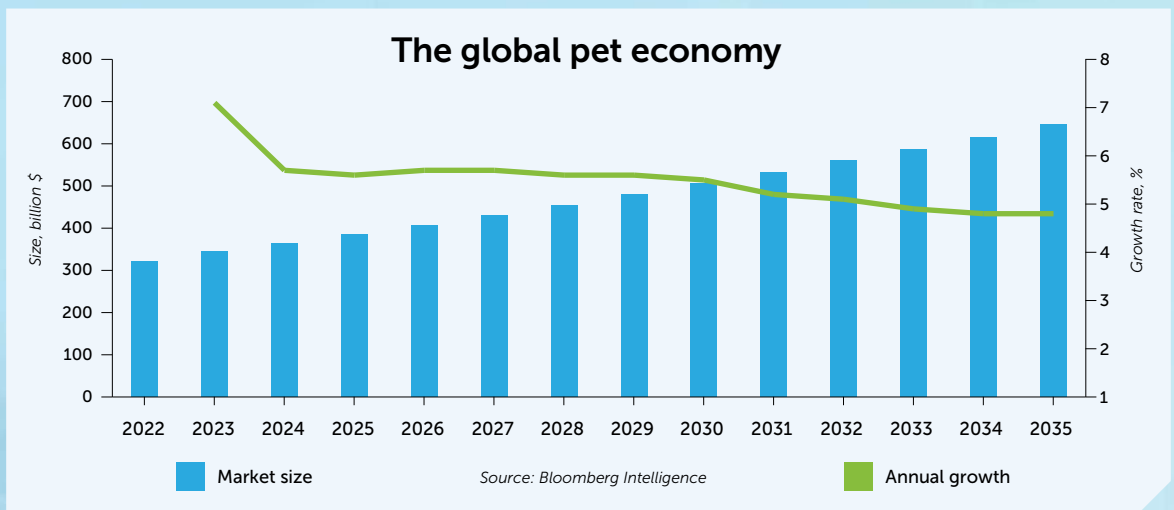
The market structure varies substantially by European country, favoring regional specialists alongside global food and animal health groups. The gap with the US also shows how much room remains. BI calculates the annual cost of owning a dog at around $840 (€749) in Europe in 2026, less than half of the $1,775 (€1,583) spent in the US. For cats, the comparison is about $570 (€508) against $1,140 (€1,017).

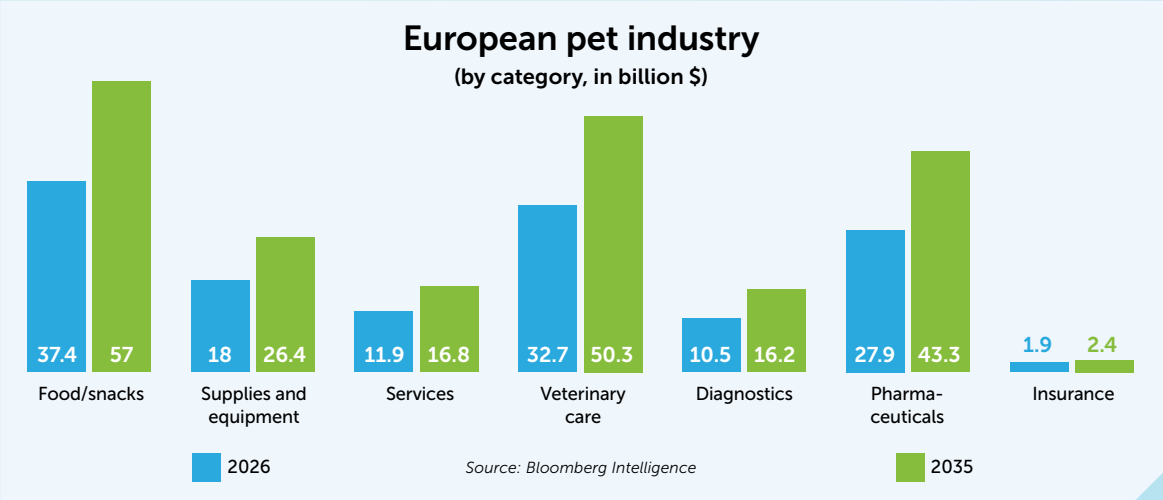
That gap does reflect the many differences between the two regions in income, pricing, healthcare use and service penetration. But, at the same time, it points to scope for European spending to rise, as owners become more willing to pay for premium nutrition, diagnostics and preventive care.

Food evolution beyond 2030

Food should remain one of the most resilient components of the pet wallet, though the pace of expansion is expected to moderate after 2030. BI's Europe scenario has food and snack

▶ SEE NEXT PAGE





sales increasing from about $37 billion (€33B) in 2026 to $47 billion (€42B) in 2030 and $57 billion (€51B) by 2035.

Premiumization remains an important driver, supported by owners' focus on ingredients, digestion, age-specific nutrition and other health benefits. Yet European consumers also have more alternatives when budgets tighten. Private label occupies a much stronger position in Western Europe than in the US, creating a broader battleground between premium, mid-priced and value offerings.

Premiumization meets value

Budget pressure and aggressive price promotions are likely to keep consumers selective in the near term, making value and private label particularly relevant even as premium products gain share over the longer run. It looks likely the path will not be linear.

Beyond 2030, growth should increasingly depend on premium, health-oriented and tailored nutrition. BI expects it to remain below the 6-7% pace seen earlier this decade, but the shift toward higher-value nutrition should continue, as owners prioritize health, age-related and functional benefits.

Under BI's current model, premium products would account for roughly 47% of the European food and snack market by 2035. This compares with about 38% for mid-priced products and 15% for economy offerings.

Retaining repeat spending online

Online pet retail should continue to gain ground in Europe, but the next stage looks different from the rapid channel migration of the past few years. BI's scenario has European pet e-commerce rising from about $23 billion (€21B) in 2026 to $30 billion (€27B) in 2030 and almost $39 billion (€35B) in 2035.

Growth will slow as the market matures, and penetration will rise only gradually, to roughly 18% of total pet spending by 2035. Europe's fragmented markets, delivery economics and well-established specialty store networks make the shift more gradual than in the US.

After 2030, the competitive focus should increasingly shift from acquiring online shoppers to keeping them through repeat spending on food, litter and pharmacy items. Reliable delivery, pricing, replenishment – and services such as pharmacy or healthcare access – become more important as routine food and supply purchases mature online.

The continent's online pet market is fragmented by country. Pets at Home says it holds more than a 20% share of the UK online pet care market, while zooplus is among the largest specialist e-commerce players in Germany and the Netherlands. That contrasts with the US, where Amazon and Chewy together account for roughly 70% of pet e-commerce sales.

Meeting the care needs of older pets

Healthcare may provide the largest near-term growth driver in the sector. Pets are now living longer as nutrition, diagnostics and therapies improve, which in turn leads to an uptick in the prevalence of chronic and age-related conditions – and in the amount spent over a pet's lifetime.

In Europe, BI's scenario puts veterinary care spending at about $50 billion (€45B) by 2035, pharmaceutical spending at more than $43 billion (€38B) and diagnostics above $16 billion (€14B). These categories retain annual growth in the high-4% range even after 2030, when expansion in food, supplies and services begins to moderate more noticeably.

From diagnostics to insurance

Increased corporate ownership of veterinarian practices could exacerbate price competition among manufacturers of therapeutics. Yet, BI estimates that a new generation of therapies in, for example, the fields of oncology, cardiology, renal disease, anxiety and obesity, can broaden the current market with potential revenue opportunities approaching $4 billion (€3.6B). More frequent diagnostic testing should lead to earlier diagnosis, fulfilling pet health demand and synergistically boosting treatment penetration in novel markets.

Insurance offers another avenue for growth in the US. Cat coverage there appears to have the widest adoption runway, with US penetration at 2.3% in 2025 vs 6% for dogs, while the number of insured cats rose by 16.3% compared with 6.8% for dogs.

Higher premiums, however, could slow broader adoption. In 2025, average accident-and-illness premiums rose by 12.6% for cats and 11.5% for dogs in the US. For retailers, insurance could prove lucrative, as it may also support loyalty and recurring engagement without requiring those businesses to take on underwriting risk.

Outlook for supplies and services

Supplies and services should keep on expanding, though more slowly than healthcare and e-commerce. BI's scenario has European supply sales rising to about $26 billion (€23B) by 2035 and services to almost $17 billion (€15B) – a total growth of 55% and 47%, respectively. This compares to the US's $35 billion (€31B) and $38 billion (€34B), 45% and 68%.

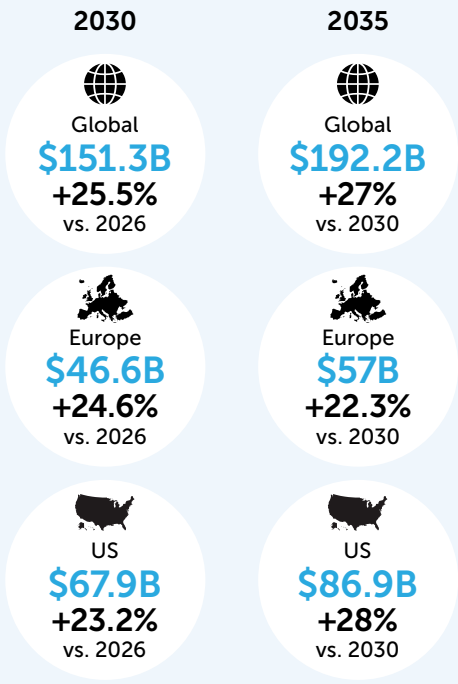
Growth in Europe should be more pronounced earlier in the forecast period, before evening out after 2030 to an annual pace in the mid-3% range. The continent also differs from the US in its mix, with replenishment categories and private label being particularly important. Cat litter, for example, has much higher private label penetration in Western Europe than in the US. Services remain relevant, but the European outlook is more supply-led than the US market, where grooming and other repeat services play a larger role in generating store visits.

Unlocking the pet wallet

The next chapter of the pet economy seems set to hinge more on a steady expansion of the pet wallet than on population growth. Through 2030, it looks likely to be premium food, digital retail and healthcare that support growth, even as consumers remain selective.

Beyond 2030, aging pets and higher care needs become more prominent drivers. But for Europe in particular an older pet population doesn't necessarily mean a mature spending opportunity. The region still has room to close part of its spending-per-pet gap with the US as products, care and retail channels become more sophisticated. ◆

Pet food and treats: market size and growth projections



Source: Bloomberg Intelligence

Lionel Desclée, CEO, zooplus

"We feel a strong sense of urgency around AI"



Technology and an expanding health and wellness assortment are central to the online retailer's strategy as it seeks to strengthen its position in Europe's competitive retail market.



David Palacios Rubio
Editor-in-Chief
GlobalPETS

Artificial intelligence (AI) is changing how consumers discover products and seek advice, creating new opportunities and challenges for e-tailers. zooplus operates in 30 markets and serves 12 million customers. The company is investing in its visibility in AI-driven search, and in tools designed to improve the customer experience.

Since joining zooplus in September 2025, Lionel Desclée has focused on the company's next phase of growth. Desclée's background spans more than a decade at Delhaize Group, the roles of President and CEO at Walmart Japan and CEO of Belgian pet retailer Tom&Co, as well as most recently CEO of online retailer The Very Group. He talks to PETS International about zooplus's short-term expansion plans as well as the company's wider growth strategy – of which zooplus marketplace is an important part.

You've been CEO for just over a year now. What have been the key developments under your leadership?

zooplus is one of the five largest European e-commerce companies across all industries. That gives us access to some of the best partners in the field. Over the past year, we've made substantial investments – tens of millions of euros – in improving our price positioning, reviewing our own brand business and investing in future growth. It has not been easy, but we now have much greater clarity and focus.

What are zooplus's strategic priorities?

One of zooplus's greatest strengths is its unique understanding of Europe's customers. We have hundreds of data points about them and their pets, their purchasing habits and the products they buy.

We've built our strategy around four things customers care about: unmatched value, an innovative assortment, health and wellness, and a joyful shopping experience. After 12 months, I am even more optimistic about the future. We have clarity on our direction, the right team and the ambition to unlock the next phase of growth.

Which countries are your largest markets?

By sales, our largest eight markets are Germany, Poland, France, Spain, Italy, the UK, the Netherlands and Switzerland. That doesn't necessarily mean they are our fastest-growing markets. We tailor our approach to each country. In some, we invest in brand awareness, as we believe we offer the best value and prices, but not enough people know us. In others, awareness is already high, but average basket or purchase frequency is lower.

You recently launched your marketplace in Germany, France and Spain. How are they performing?

The marketplace is a way to expand our assortment more quickly in categories that matter to customers.

"The larger shift is to reinvent ourselves as an AI-native company, because a competitor could emerge that has built its business around AI from the start."

Fresh and frozen products are a good example: categories that are growing quickly, but setting up the logistics requires significant investment. Our marketplace lets us offer more choice without building that infrastructure ourselves.

We're seeing encouraging growth. Since launching the Germany marketplace in July, we have doubled the number of sellers, tripled the number of products and are expanding the categories available.

Next year, we're planning more expansion, so that customers in all our largest markets can access the marketplace. We'll also increase the number of sellers and broaden the curated assortment. We do not intend to list millions of similar products – we want a selection that fits with what our customers expect.

Do you also adapt your strategy by product category?
Yes. In some categories, we're underrepresented and need to invest more, or we see an opportunity. Accessories, for example, are important for attracting new customers. It was one of the reasons why we launched our marketplace.

What role will third-party sellers play?
zooplus is predominantly a house of brands, and long-term brand partnerships are central to our strategy. We offer them European reach from a central point, as well as data insights, operational efficiency and scale to help them grow across Europe. For most of our largest suppliers, we have centralized first-party relationships and develop long-term growth plans together.

The marketplace is also a way for smaller brands to reach new customers, if they themselves don't have the scale to operate across Europe. It provides a way to enter a market and helps us understand how attractive their products are to customers. Local brands are important because they respond to the needs of individual markets, while other brands serve different roles in our assortment.

How does the zooplus marketplace differentiate from competitors?
Our differentiation is our focus. We serve pet parents exclusively and have built considerable expertise and a substantial data set over 25 years. That gives us a distinctive relationship with customers and helps us build trust. Smaller brands can benefit from that specialist focus and from access to customers across Europe.

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Which trends are shaping the company's priorities?
The number of pets has broadly stabilized since the pandemic, but the relationship people have with their pets continues to evolve. European markets differ in pet types, food choices and annual spending per customer, so we need a differentiated approach. One clear trend is that pet parents now care more about health and wellness than ever before.

So health and wellness are a key focus?
The pets acquired during the Covid period are getting older, and we expect a new cohort of mature pets around 2027-2030. Pet parents increasingly see their pets as family members and really want to support their health and wellbeing.

This is a major focus for us: we'll expand our health and wellness assortment and develop an ecosystem of services and expertise to support pets throughout their lives. We plan to double the number of health and wellness SKUs next year.

Is the shift from offline to online shopping affecting the market?
We estimate that between €400 million ($446M) and €500 million ($557M) in sales moves from offline to online each year. As pet parents increasingly shop online, we need to provide more personalization, expertise and guidance.

You launched a best discount guarantee in September. Why was that?
Our ambition is to be the best pet retailer for pet parents in Europe. Unmatched value is one of the four pillars of our proposition. Customers can now join zooplus Club Premium, a paid loyalty tier that offers permanent discounts on purchases, exclusive promotions, free products and other benefits for a relatively small annual fee.

How does your pricing policy benefit Autoship subscribers?
We'd noticed that customers could sometimes get a better deal through a promotion than through the Autoship discount. We didn't want them having to calculate whether they should subscribe or wait for the next promotion. Now, with the best discount guarantee, customers always receive the best price: either the discounted Autoship price or the promotion available. This helps ensure that our most loyal customers always get the best value.

Do you plan to expand your loyalty programs?
Our ambition for zooplus Club Premium is to offer more than just financial discounts. Over time, we could add services such as free delivery and other benefits that we're considering. zooplus Club also has a free tier, Basic, where customers earn points that can be exchanged for products. We're seeing more customers use our loyalty programs, whether zooplus Club Basic, Premium or Autoship. Autoship is growing at a double-digit rate.

In what way is AI helping zooplus personalize customer experiences?
We know a great deal about our customers and their pets, and benefits can be tailored to individual customers. We are learning even more through our AI agent, including qualitative information about what customers are thinking and asking.

One Zoomy [zooplus's AI customer service chatbot] insight is that around 72-73% of conversations are about suitability: customers are unsure what to buy and want guidance. This shows that they're looking for more than low prices or a familiar brand – they want specific advice for their pet.

How does Zoomy work, and where is it currently available?
Think of the best salesperson you've encountered in a specialist pet store. Zoomy aims to provide that kind of support online. It really knows the assortment and can use the information customers have shared about their

pets, as well as their purchase history, to guide them. We launched Zoomy in our first test market in February, and now provide suggested prompts to help customers ask the right questions.

We recently expanded Zoomy to the web experience of all zooplus markets, and we continue to improve its capabilities. Generative AI is developing very quickly, and this is one way for us to share our expertise, particularly on health and wellness, and make shopping easier for customers.

How important is it for zooplus to become an AI-native company?

Extremely important. We monitor our generative engine optimization (GEO) traffic every week, using hundreds of prompts to make sure we're well represented. But AI is not only about visibility. It's also about improving customer experience through personalization and working more effectively.

Zoomy is just one part of that. The larger shift is to reinvent ourselves as an AI-native company, because a competitor could emerge that has built its business around AI from the start. We feel a strong sense of urgency around AI, and it's a personal passion of mine as well.

The approach is working well...

We've seen a significant acceleration: GEO traffic has tripled over the past three months. Responding to it requires substantial investment, and we've decided to make that investment so we can lead in Europe. We believe we're also well positioned globally, compared with other companies.

How are you developing your logistics network?

We have distribution centers across Europe and continue to invest in logistics. In 2028, we plan to launch a much larger, automated distribution center in the UK. We're also planning a new inbound hub in Poland for shipments arriving from the Far East. And we've centralized pharmacy operations in Poland too.

Efficient operations are valuable to our brand partners and help us maintain strong prices across Europe. Historically, zooplus's proposition was simple: a large assortment, low prices and efficient logistics. We are continuing to build on that. Logistics efficiency remains essential, both for value and for offering a wide range of products from a central European location.

"In 2028, we plan to open an automated distribution center in the UK and a new inbound hub in Poland for Far East shipments."

What are the company's key priorities for growth over the next two years?

The online pet market is growing by around 7-9% annually. Our next frontier is to help owners support their pets through every life stage. Over the next two years, we'll continue to improve our four pillars of great value, health expertise, innovative products and the best customer experience.

Which markets and product categories offer the greatest opportunities?

We have different priorities in different countries. Central Europe is growing quickly. We're well positioned there, and our new leadership team has strong representation from the region. We have a high market share in Germany, and the priority is to defend it against strong competition.

Spain and Italy are also growing very fast, so we're investing in brand awareness and media in those southern European countries. The UK remains attractive because it is Europe's largest online market. Our brand awareness and market share are relatively low there compared with some competitors, so we're investing in attracting new customers.

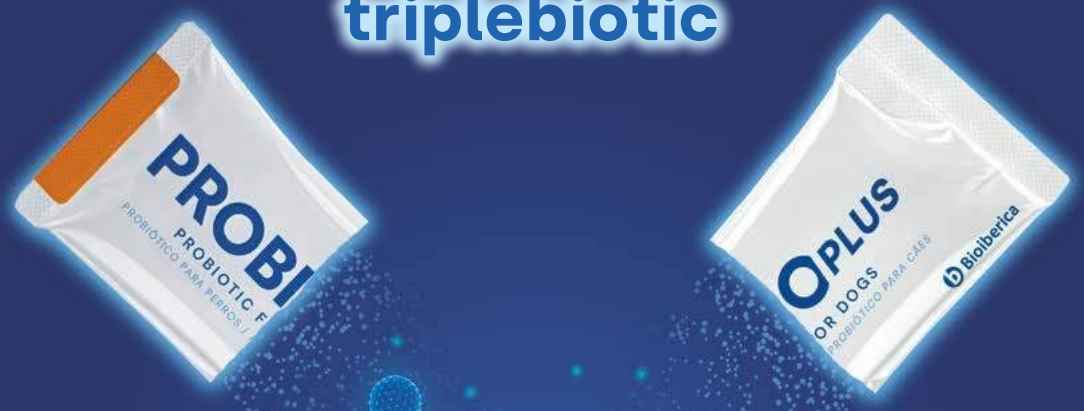
Across the markets, we see possibilities to grow different categories through the marketplace. Accessories is one example – health and wellness is another. With our 25 years of experience, combined with our customer base, logistics network and efficient operations, I believe we have strong foundations for further growth.

Do you see opportunities to expand zooplus into markets beyond Europe?

We are currently present across Europe, and that is our focus. We have enough opportunities ahead of us without expanding beyond the region. ◆

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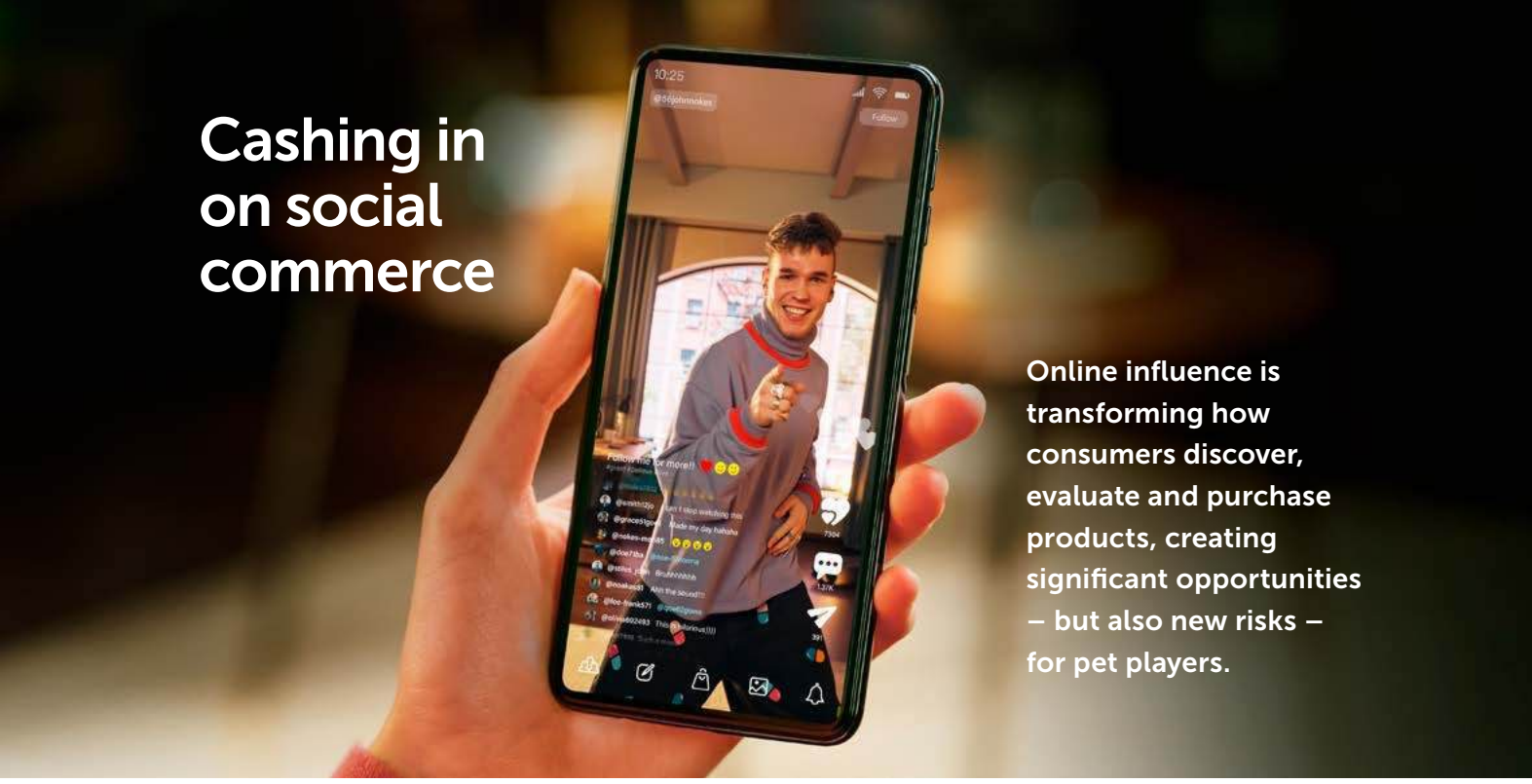
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Cashing in on social commerce



Online influence is transforming how consumers discover, evaluate and purchase products, creating significant opportunities – but also new risks – for pet players.



Michael Coombs
Founder and COO
Unbox

Social media channels are changing how people learn about products, with pet-related posts emerging as a particularly engaged corner of the market. As TikTok and other platforms increasingly combine content, creators and checkout, brands have an opportunity to reach highly connected communities directly.

Understanding the numbers

Pets are, by their very nature, 'content gold': emotionally resonant, consistently surprising and endlessly shareable. There's a corner of the internet where a golden retriever opening a new toy gets 5.2 million views. Where a cat reacting to a new puzzle feeder goes viral overnight. Where the hashtag #PetsOfTikTok is linked to nearly 15 million posts, and #CatsOfTikTok to as many as 57.5 million. Where, increasingly, views convert directly into sales: no Google search, no separate checkout, no friction.

Research from social commerce agency Unbox and research consultancy Retail Economics among 2,000 UK consumers puts the scale of the shift in sharp relief. Almost half of the adults surveyed (47%) have already bought directly through a social platform. That figure rises to 78% among Gen Z consumers.

TikTok is the dominant force, accounting for 53% of all UK social commerce spend. Its seamless in-app checkout – where a viewer can go from discovery to purchase in under 30 seconds – has fundamentally changed how products get found and bought.

Over half of UK adults (51%) expect that social platforms will account for a greater share of their online purchases in 2026. At 66%, that figure is even higher among TikTok users. These numbers mean that social platforms are no longer a niche, but a mainstream retail channel.

PetTok: a ready-made audience

For pet brands specifically, the opportunity has a name: PetTok. Around the world, the pet content ecosystem on TikTok and Instagram is one of the most engaged communities on social media.

Consider what this means in commercial terms. A pet food brand partnering with a creator whose rescue greyhound has 600,000 followers isn't just buying an impression – it's buying into a community of highly engaged, passionate pet owners who take that creator's product recommendations seriously. The research confirms that trust has fundamentally shifted: Gen Z consumers are now twice as likely to trust a content creator (43%) as they are a brand's own advertising (22%).

▶ SEE NEXT PAGE

The pet category is particularly well suited to this trust economy. Owners are deeply invested in the health and happiness of their animals. A vet-trained creator recommending a joint supplement, or a dog trainer walking through why a particular harness fits better, is content that converts, because it's content that genuinely helps.

Turn paradox into opportunity

And yet, here's the paradox: despite all that organic consumer passion, pet care remains one of the most underserved categories in social commerce relative to consumer demand. Fashion, beauty and other fast-moving consumer goods dominate social commerce spending today. Pet brands, by and large, are still watching from the sidelines. That gap is an opportunity.

The pet brands that start working to establish a credible, scaled presence in social commerce will accrue significant first-mover advantages. Creator relationships take time to build. Affiliate networks take time to optimize. The algorithms reward consistency. The players that move decisively now will find themselves in a structurally stronger position as the channel matures – and as competitors begin to catch up.

The risks are real

Unbox research shows that a significant proportion of affiliate content produced by global brands contains some form of reputational safety risk – from unverified product claims to misrepresentation of brand values. This is why the conversation needs to become more serious – because, in the pet category, the brand safety stakes are higher, more acute and more consequential than in almost any other sector.

For pet brands, the specific risks are:

Unverified health and ingredient claims

Pet nutrition is a complex, regulated area. A creator claiming that a pet food is "grain-free and vet-recommended" without verification is not just a brand safety issue; it's a potential regulatory and reputational crisis. Misleading claims about ingredients, allergens or health benefits can cause real harm to animals and expose brands to significant legal liability.

Pseudoscientific veterinary endorsements

The pet category is particularly vulnerable in cases of content that implies veterinary endorsement without substantiation. A creator in a white coat saying "As a vet, I recommend..." – when they are not a vet, or a product not being independently assessed – is precisely the kind of content that can spread rapidly on social platforms, and exactly the kind of content that regulators are increasingly scrutinizing.

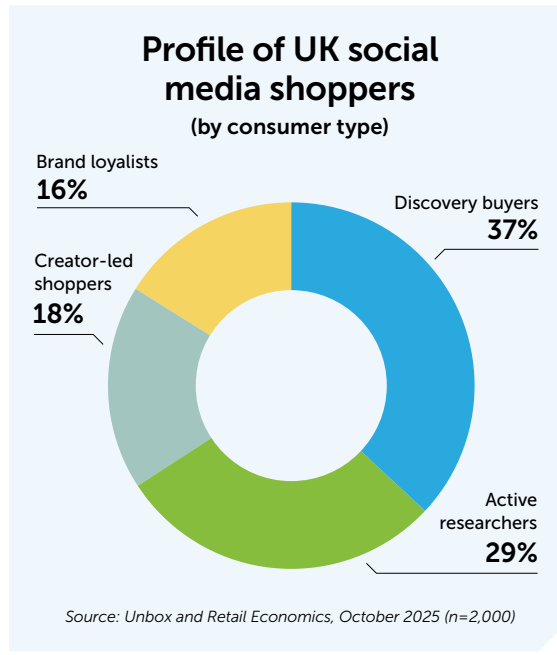
Animal welfare

The treatment of animals in the content itself matters. Pets dressed in restrictive clothing for entertainment purposes, animals placed in stressful situations for comedic effect, training methods shown in videos that conflict with positive reinforcement or welfare standards – all of these create the risk of reputational damage for any brand whose products appear in that content.

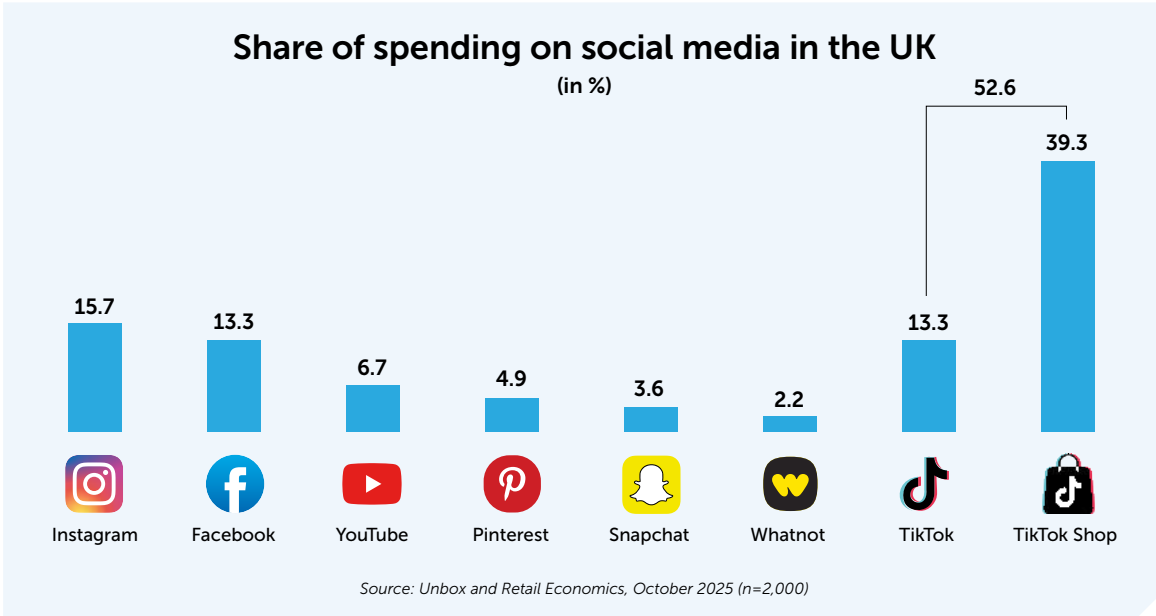
The challenge is one of scale. With hundreds or even thousands of creators participating in TikTok Shop's affiliate program, it is operationally impossible to manually review every video. And yet every unreviewed video carries these risks.

The answer: better governance

For risk-averse pet brands, the temptation is to move slowly or stay away from social commerce altogether. But that is precisely the wrong conclusion. The answer to the risks of unmanaged scale is not less scale; it is better governance.



Source: Unbox and Retail Economics, October 2025 (n=2,000)



Source: Unbox and Retail Economics, October 2025 (n=2,000)

For pet brands, governance across the creator ecosystem means:

- Automated content review for claim verification and brand safety flags
- Structured briefing frameworks that give creators clear guardrails on ingredient language, health claims and animal welfare standards
- Creator vetting that goes beyond follower counts to assess alignment with brand values
- Performance analytics that link creator activity directly to verified commercial outcomes

This isn't about constraining creativity. The best-performing content in social commerce is authentic, entertaining and genuinely useful – not corporate. The goal is to create the conditions under which creators can be themselves, while the brand remains protected.

Three priorities for pet brands

For pet retailers and brands looking to build a serious social commerce presence, the strategic priorities are clear:

1. Move now, but move deliberately
The category is underserved and the moment to establish presence is now. But the answer is not to open the affiliate floodgates and hope for the best. Build your creator program with the same rigor you would apply to any other sales channel – with clear criteria, proper briefing and systematic review.

2. Make trust your differentiator
The broader consumer trust challenges in social commerce – authenticity concerns, skepticism about product claims – are an opportunity for reputable pet brands to stand out. Verified ingredients, genuine veterinary partnerships and transparent welfare standards are credentials that resonate powerfully in a creator-driven environment where trust is currency.

3. Invest in infrastructure, not just content
The brands winning in social commerce treat it as a core business function, not a marketing experiment. That means bringing together commerce, marketing and data teams, investing in technology that provides visibility and control across the creator ecosystem, and building the operational capability to move at the speed the channel demands.

The bottom line

The pet industry has one of the most passionate, engaged consumer communities on social media. PetTok is not a niche phenomenon. It is a commercial ecosystem of extraordinary scale and reach, and it is still comparatively untapped by serious players.

The brands that understand both the opportunity and the specific risks offered by the pet category are the ones that will define this channel. The infrastructure to succeed in doing this now exists. The question is simply: who moves first? ◆

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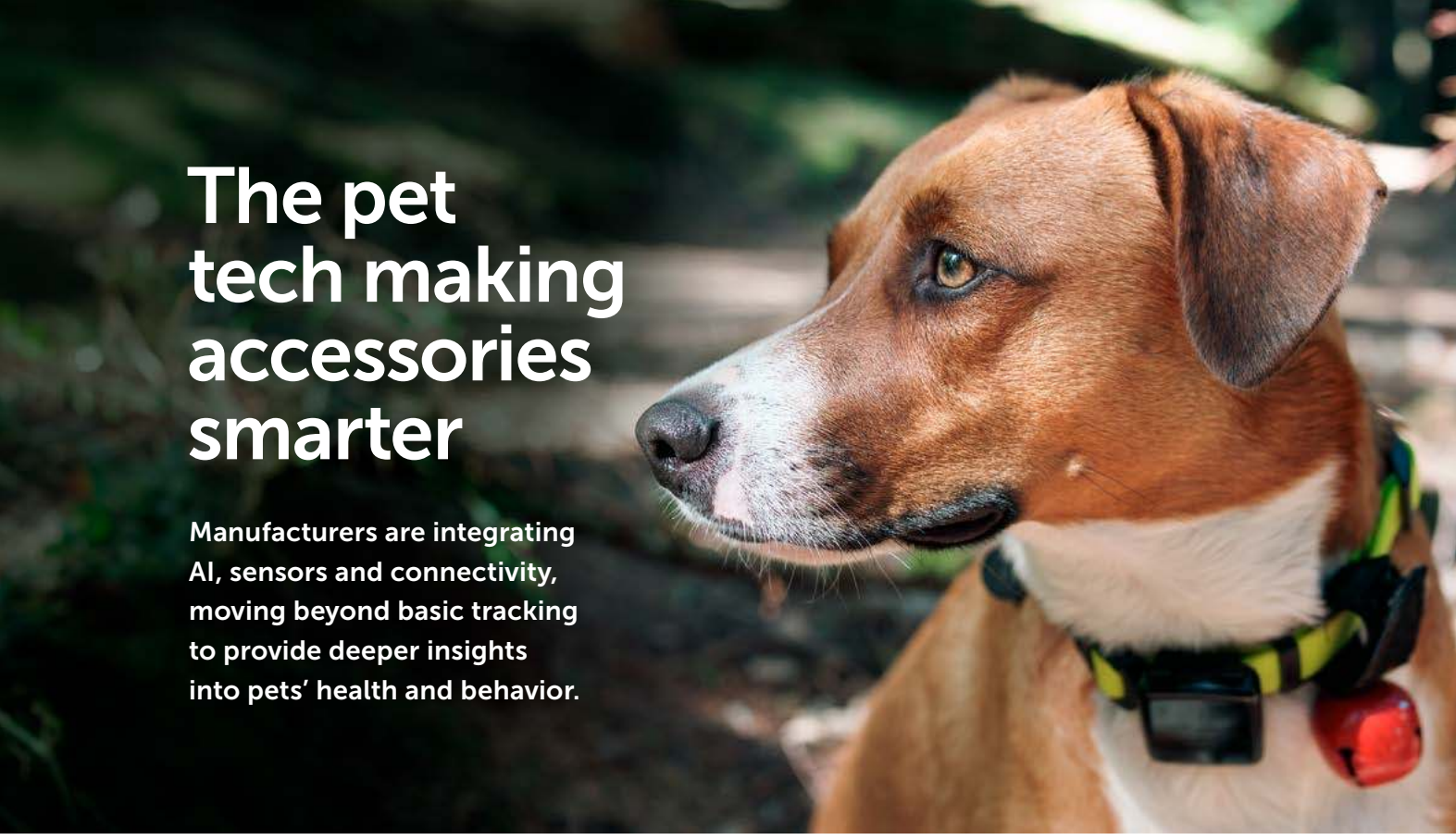
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The pet tech making accessories smarter



Manufacturers are integrating AI, sensors and connectivity, moving beyond basic tracking to provide deeper insights into pets' health and behavior.



Diana Dominguez
Business Reporter
GlobalPETS

The latest product launches and partnerships suggest that pet tech is increasingly being shaped around specific challenges in how owners monitor, understand and manage their pets' care. Businesses are embedding ever more advanced technology into everyday pet products to provide detailed insights into pet safety and health, or to simplify daily routines.

Improved tracking coverage

Pet tracking is evolving beyond basic GPS location services, with companies improving connectivity, positioning and the amount of information available to owners. When smart pet technology brand Fi launched the Fi Ultra, it became the world's first dog tracker powered by T-Mobile's T-Satellite service with aerospace firm SpaceX's Starlink.

The device is designed to stay connected when cellular coverage is unavailable, extending tracking capabilities to areas with limited network access. Currently, the service is only available in the US but will be rolled out in other markets as its reach expands.

"Fi Ultra powered by T-Satellite with Starlink opens up a customer segment no pet tracker on the market has been able to serve up to this point: the pet parent whose dog spends significant time outdoors and in areas with more limited coverage," Jonathan Bensamoun, CEO and co-founder of Fi tells PETS International.

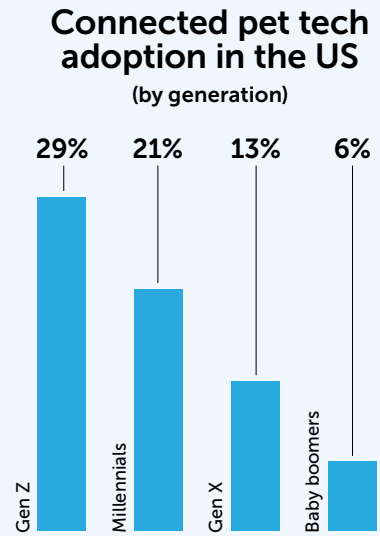
Integration into everyday life

Beyond connectivity, Fi also recently partnered with Verizon, the US's largest wireless carrier, to integrate its Fi Mini tracker into Verizon's Family app. The features of this digital assistant include real-time location sharing, content filters, screen time management and driving insights. The integration allows Verizon customers to add their pets to the same safety system, with safe zone alerts notifying owners when a pet leaves a designated area.

"These partnerships target two distinct growth channels. Verizon lowers the barrier to entry for mainstream connected pet care by embedding Fi into daily family safety routines. Fi Ultra provides coverage to those who live their lives beyond cell coverage, such as hikers, farmers and ranchers," continues Bensamoun.

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Source: Packaged Facts, January 2026

At IFA 2026, Europe's largest consumer electronics and home appliances trade fair, held in Berlin, Chinese smart home and pet care brand Neakasa launched not one, but two innovations aimed at automating parts of the pet care routine. The Riko smart feeder stores freeze-dried food and automatically grinds and rehydrates it into wet food at feeding time, supporting more than 20 scheduled meals per day.

Smarter tracking and safety

Meanwhile, Neakasa's M9 self-cleaning cat litter box takes a structural approach to automated litter box safety with its Tilt-Safe Rotation design, reducing potential areas where a cat could become trapped or pinched.

Another interesting launch at IFA came from SATELLAI, an AI-powered pet care company, with its next generation of SATELLAI Sense AI and new connected pet wearables. Moving beyond standard pet tracking, SATELLAI is developing technology to help pet parents better understand their pets' behavior, routines, activity and wellbeing.

SATELLAI Sense AI is at the center of this evolution, interpreting pet data and translating behavioral patterns and changes into natural language insights. At the fair, the company introduced its first smart wearable for cats, the SATELLAI Cat Tag, and showcased the SATELLAI Tracker Ultra, a satellite-connected dog wearable designed for off-grid environments.

"Many existing trackers are primarily designed to collect and display location or activity data," the company says. "SATELLAI Sense AI is designed to interpret those signals over time, understand each pet's individual patterns and turn them into useful context through daily summaries, personalized insights and proactive notifications."

Improved location accuracy

SATELLAI also expanded its collaboration with global connectivity provider Deutsche Telekom IoT and positioning technology enterprise Swift Navigation.

The collaboration with Swift Navigation aims to improve location accuracy and support GPS-based features such as virtual boundaries, route history and escape alerts. Meanwhile, Deutsche Telekom IoT's connectivity helps maintain communication between connected pet devices and SATELLAI's cloud-based services across international markets.

Another location and safety technology company, Life360, has launched the Pet Tag. This stainless-steel QR code collar tag allows anyone who finds a lost pet to contact its owner or share the pet's location with the

owner's Life360 Circle account without needing an app. Pet parents can update the contact details linked to the tag through their pet's Life360 profile.

Proactive care

Technology is increasingly being used not only to monitor pet health, but also to help owners interpret data and understand changes in their pets' health and behavior. For instance, OpenVet, a Florida-based comparative medical intelligence company for veterinary care, recently launched OpenAnimal. This owner-facing platform combines pets' medical histories with veterinary evidence and guidance.

In another example, in April Tractive launched its DOG 6 XL tracker alongside the CAT 6 Mini, its first-ever collar-integrated GPS and health tracker built specifically for cats. Aiming to bridge the gap between reactive tracking and proactive pet care, both devices combine GPS with continuous health and behavioral monitoring, giving owners a more complete picture of their pet's wellbeing over time.

"By continuously monitoring metrics like activity, sleep, resting heart rate and respiratory rate, Tractive can help owners better understand what is normal for their individual pet and identify meaningful changes over time," states the company.

Tractive says its products are designed around the specific needs of each animal type. The DOG 6 XL, which features improved durability, a lighter-weight design and longer battery performance, is tailored to larger breeds and highly active dogs. The firm, which was acquired by technology company Bending Spoons in May, also debuted an ultra-durable XL Adventure Edition in the summer. The CAT 6 Mini is oriented to cats' distinct behaviors, movement patterns and health signals rather than adapting a dog-focused design.

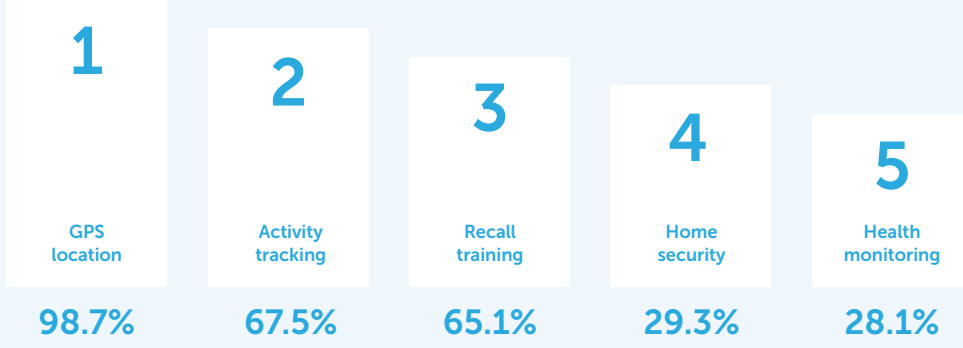
For PETKIT, meanwhile, the focus is on addressing the fragmented nature of everyday pet care, where feeding, drinking and toileting are often monitored separately. The Chinese-based company has developed an integrated system that connects data from these routines to provide a more complete picture of a pet's health through an AI-powered ecosystem, supporting preventive urinary care. Its cat feeders, fountains and litter boxes use AI cameras and multi-pet facial recognition to identify individual pets and track changes in their daily behavior without requiring a wearable device.

From health to behavior

The focus on interpreting pet health data is also extending beyond physical health. In mid-October, Chinese global pet tech brand Dogness officially launched its new-generation AI Pet Feeder based on technical cooperation agreements with Google Cloud. It is equipped with high-definition night vision and a 120-degree ultra-wide-angle camera, allowing users to seamlessly monitor their pets' eating, activities and resting status at any time via the mobile app.

▶ SEE NEXT PAGE

Top 5 functions European owners value in a GPS tracker*



**Multiple responses allowed*
Source: Weenect, July 2025, (n=1,929 dog and cat owners) in France, Germany, Spain, Italy, the Netherlands and the UK

Moreover, leveraging the behavioral recognition capabilities of Google Gemini AI, the feeder can automatically monitor the pet's status, identify abnormal behaviors and issue timely alerts.

According to Dogness, this proactive feature helps owners anticipate potential health risks, propelling the pet care experience from 'functional connectivity' to 'emotional understanding'.

In a similar vein, Silicon Valley-based pet emotional intelligence company Traini partnered with global smartphone brand TECNO to integrate its pet emotion translation model as a native smartphone capability. This allows users to interpret their pets' emotions, intentions and needs through their phones.

According to Traini, this partnership is part of its long-term goal to make intelligence available across the pet, consumer electronics, automotive, insurance and healthcare ecosystems. It says the next stage of pet tech will involve embedding pet intelligence into devices people already use, including smartphones, vehicles, smart-home devices and wearables.

Translating pet noises into words

Chinese startup PettiChat aims to take interpreting pet emotions to the next level. In April, it launched an AI-powered collar that translates dog barks and cat meows into full sentences on a smartphone in just 1.2 seconds. Powered by Alibaba Cloud's Qwen AI model and trained on over one million vocal and behavior samples, the device is being positioned as "the world's first real-time two-way pet translator".

The company claims it detects pet emotions and intent with up to 94.6% accuracy. Although scientists remain skeptical, PettiChat secured more than 10,000 preorders at an early-bird price of $119 (€107) and the startup secured $1 million (€897,000) in angel funding in May.

Opportunities to expand reach

Overall, pet tech is becoming a more ambitious and sophisticated category even while take-up remains uneven. This leaves room for companies to expand beyond early adopters and make these technologies more relevant to a wider group of pet owners. ◆

Seeking value in connected technology

European pet owners appear to prioritize reliability and practical benefits over increasingly complex connected devices. In 2025, Weenect – a French manufacturer of GPS trackers for pets – conducted a survey among 1,929 dog and cat owners across France, Germany, Italy, the Netherlands, Spain and the UK. The findings revealed that 79.3% preferred a simple, reliable GPS tracker over a multifunctional model. GPS location was valued by 98.7% of respondents, followed by activity tracking (67.5%) and recall training (65.1%).

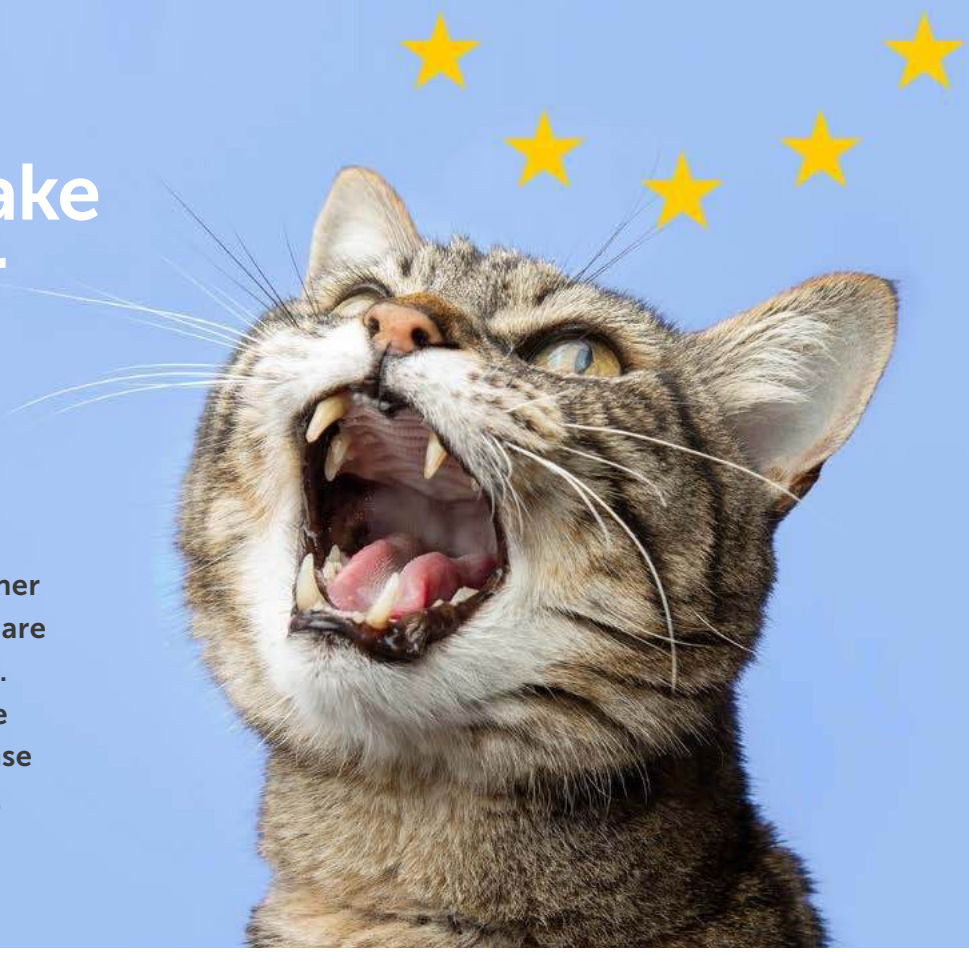
Willingness to pay for additional functionality remains a challenge. In the same survey, 59.5% of respondents said they would not pay more for extra features, while 14.8% would consider doing so if the added value were clear. Many also had reservations related to health-monitoring capabilities: 42.5% considered them useful only when they addressed a concrete need, while 25.7% felt such features went too far.

Concerns about false diagnoses were reported by 59.5% of respondents, highlighting the importance of reliability and trust as manufacturers incorporate health insights into connected accessories. Data from the US, meanwhile, suggests that connected pet products still have considerable room to grow. According to a January 2026 survey by market research firm Packaged Facts, 15% of US pet owners used internet- or Bluetooth-connected pet products.

Purchasing activity points to a broader market opportunity. Nearly four in 10 respondents (39%) had bought a high-tech pet durable product in the previous 12 months. Automatic feeders and waterers were the most popular category, purchased by 15% of respondents, while toys, smart litter boxes, cameras and video systems, and pet wearables each accounted for 12%.

NielsenIQ's August 2026 analysis found that 63% of US pet owners were willing to adopt more technology to improve their pets' care, pointing to further growth opportunities for the category.

Treats take a bigger bite in Europe



Rises in household penetration and higher consumer spending are accelerating growth. The next step for the category is to increase purchase frequency.



Andrea Deitert
Global Insight Leader Pet Care
NIQ



Marcin Traczyk
Pet Insight Analyst
NIQ

A little snack to chew or crunch is no longer just an occasional reward for a pet. Across Europe, these products are becoming an important part of pet food spending. Cat items, in particular, are consistently outperforming more standard meal segments.

Innovation outside the food bowl

A walk into any pet store today is all it takes to reveal how much shelf space is dedicated to treats. What was once a relatively small part of the category has become one of its most active areas for innovation, with new textures, formats and propositions continuing to enter the market.

That shift is increasingly visible in the numbers. NIQ retail data from the 12 months to August 2026 shows cat treats growing by 9.3% in value across Europe, while lickables have recorded even stronger gains in most markets.

Across Europe, treats are growing faster than traditional pet food segments, particularly in the cat aisle, where they are helping to drive category momentum. While wet and dry food still represents the largest share of sales and remains central to everyday feeding, shoppers are also adding products that create moments beyond mealtimes.

Lickables are one of the clearest examples of this trend. The format is attracting new customers, generating additional purchase occasions and opening fresh opportunities for both manufacturers and retailers. Looking first at Europe in total, and then more closely at the Baltics and some additional EU markets, the NIQ data reveals that some of the strongest growth is found outside the traditional food bowl.

What the numbers show

Across Europe, cat food continues to outperform dog food. Based on combined online and

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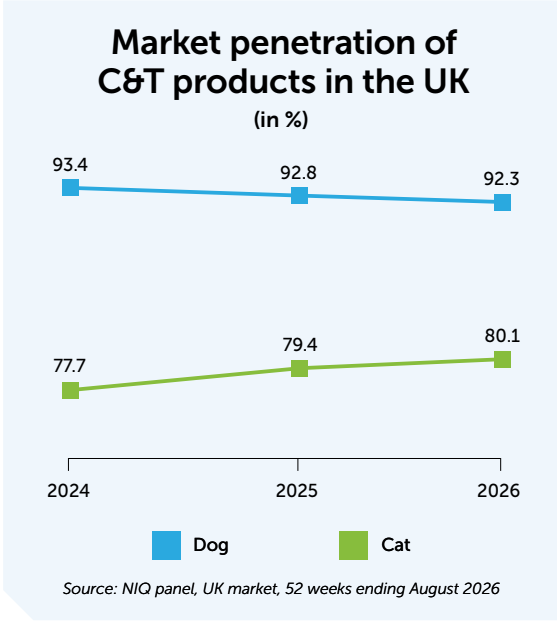
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offline retail sales for the latest 12 months, ending August 2026, the cat food category is worth €13.3 billion ($14.9B) and grew by 4.7% year on year, while dog food reached €9.4 billion ($10.5B) and remained broadly flat (+0.3%). Sales volume for cat food increased by 2.2%, while dog food declined by 1.8% over the same period.

Within cat food, wet food remains dominant, accounting for just over 62% of value sales. Dry and semi-moist products represent around 27%, while treats account for approximately 10%. Yet despite their smaller share of the category, treats are delivering the strongest growth percentage, while wet remains the biggest absolute growth contributor with +€400 million ($447M).

Cat treats expanded by 9.3% in value, more than double the growth of wet food (+4.4%) and also ahead of dry and semi-moist products (+3.9%). Volume increased even faster, by 11.1%, while volume price declined by 1.6%. This shows that growth came from increased demand rather than higher prices alone.

The picture is different for dog food. Treats already represent around 30% of category value, but growth is more modest. Dog treats increased by 1.8%, slightly ahead of wet food (+1.4%), while dry and semi-moist food declined by 1.8%. Taken together, these figures point to growing opportunities for both dog and cat products that create feeding occasions beyond traditional meals.



Source: NIQ panel, UK market, 52 weeks ending August 2026

Across these markets, lickables already account for around 20-30% of cat treat sales, yet continue to grow considerably faster than the category overall.

The Baltics and Nordics

Zooming in on the Baltic states, retail data points to the same dynamic. In the Baltics, cat treats account for only 7% of cat food value sales but are the fastest-growing major segment. Sales increased by 11.6%, compared with 1.8% growth for wet food, while dry cat food declined by 2.4%.

A similar pattern is visible in the dog food segment. Baltic dog treats grew by 3.1%, which puts them ahead of total dog food growth of just 0.5%. Dry dog food sales dropped by 6.6% in the same period.

The Nordics tell a comparable story. Cat treats grew by 7% there, significantly outperforming wet food (+1.4%) and contrasting with a decline in dry and semi-moist food (-2.1%). In dog food, where the total market shrank by 2.1%, treats proved more resilient than the main meal segments, slipping by only 0.6% compared with drops of -1.4% for wet and -5.4% for dry and semi-moist food.

A European trend

Looking beyond Northern Europe, the trends are similar. In the UK, cat treats expanded by 9.2%, making them the fastest-growing major segment within cat food. Dog treats grew by 1.2%, while the overall dog food market declined slightly.

In Germany, cat treats increased by 4.9%, compared with total cat food growth of 1.5%, while dry food declined by 1.3%. And in France, the same trend is discernible. Cat treats grew by 8.7%, significantly ahead of total cat food growth of just 0.5%, while dry food sales fell by 2.7%. Across all these markets, treats are consistently outperforming many of the larger meal segments, particularly within cat food. ▶ SEE NEXT PAGE

Lickables lead the aisle

Although the total Care & Treats (C&T) category contributes significantly to pet food sector growth, there are notable differences between types of products. The C&T category measured by NIQ includes not only treats but also functional products such as dental treats and other small care-related items.

While established formats, such as pockets, continue to account for a substantial share of sales, much of the momentum across Europe is coming from lickables, a format that is increasingly outperforming the wider treats category in most markets.

Lickables have gained significant traction across the Baltics, the UK, Germany and France. In the Baltics, traditional pockets remain the largest cat treat segment, accounting for 58% of sales. Yet the strongest surge comes from lickables, which grew by almost 85% despite representing only around one-fifth of category value. Other formats have been far less successful, with pockets growing by 5.3%, while sales of kibble treats, strips and sticks declined.

New brands and propositions

The same pattern can be seen across Western Europe. In the UK, lickables grew by 37.1%, outperforming total treats. Germany's liquid and creamy treats segment expanded by 19.9%, while in France lickables grew by 45.7%, more than five times faster than the category as a whole.

Across these markets, lickables already account for around 20-30% of cat treat sales, yet continue to grow considerably faster than the category overall. That combination of scale and growth is relatively rare in mature categories and helps explain why the format is attracting increasing attention from manufacturers, retailers and shoppers alike.

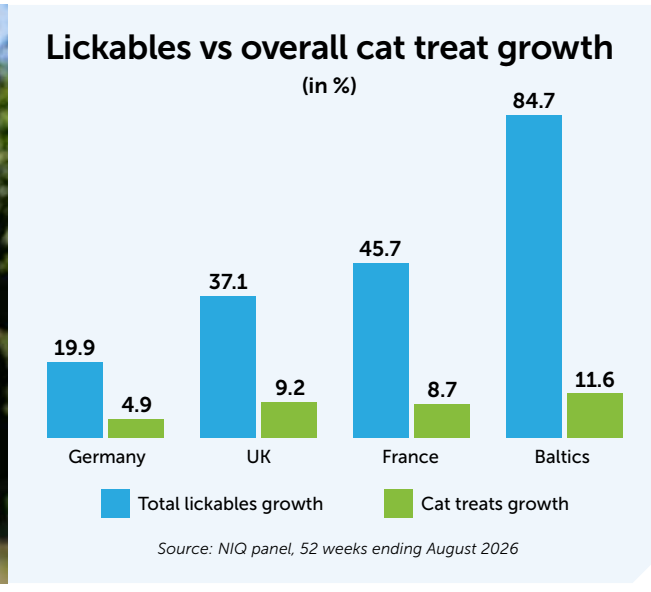
Alongside this measured growth, lickables are seeing more specialist brands and new propositions entering the segment. The e-commerce channel provides these players with an additional route to reach shoppers, particularly before they are in a position to secure wider store distribution.

Online is, at the same time, growing faster than physical retail. In the UK, for instance, online represents almost 27% of total C&T category sales value, but this grew by 4.1% according to NIQ data. Cat treats significantly outperformed the category, growing by 22.4% within the channel, while dog treat sales declined by 0.7%.

Still recruiting shoppers

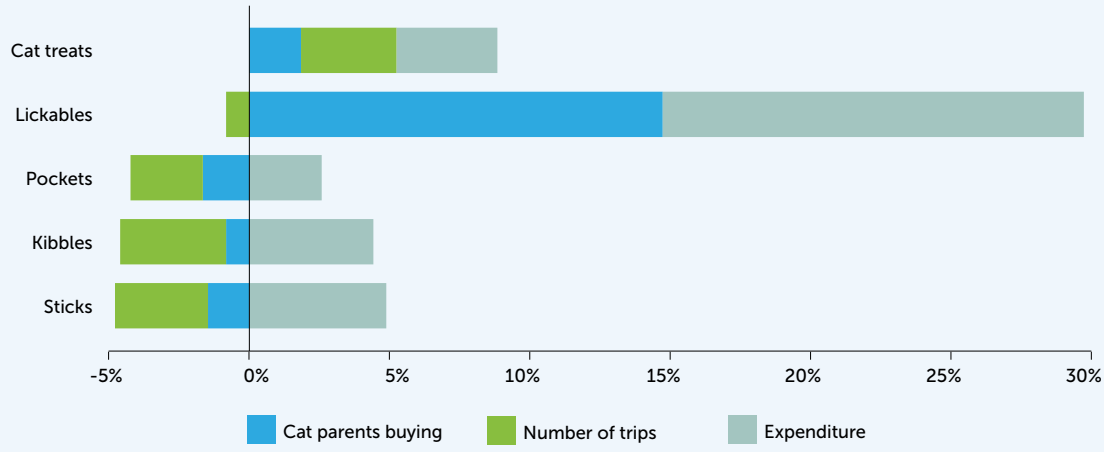
Retail data shows where growth is concentrated. On top of that, consumer panel data from the UK provides a greater insight into how shoppers are engaging. The





Source: NIQ panel, 52 weeks ending August 2026

Breakdown of cat treat spending in the UK



Source: NIQ panel UK, 52 weeks ending August 2026

UK is a useful case study because it is one of Europe's most established C&T markets while still showing strong adoption of newer formats. Far from reaching a ceiling, the category continues to recruit new shoppers, particularly within the cat treats segment.

Some 92.3% of all dog owners buy products in the C&T category, but this has declined slightly from 93.4% two years ago. Purchase frequency also fell in the latest measured year. Cat C&T penetration, by contrast, increased from 77.7% to 80.1% over the past two years.

Lickables are central to this momentum. Among cat parents, household penetration has increased from 25.9% to 32.1% over two years, compared with the more gradual increase for the total cat C&T category. In the latest measured year alone, lickables gained 3.7 penetration points, while the total category gained just 0.8 points.

Building loyalty

The growth of lickables in the UK reflects both recruitment and higher spend. New buyers contributed 9.7 percentage points of lickables growth, while retained buyers contributed a further 17.7 points. Spend per trip increased from £2.63 (€3.13/$3.50) to £3 (€3.57/$4), a rise of 14.1%.

There's still potential for strengthening repeat purchasing. The total number of occasions for providing lickables increased by 13%, largely because more households bought the format. But occasions per buyer declined slightly – from 6.3 to 6.2 – while this increased from 12.4 to 12.8 for all cat products in the C&T category. Nearly one-third of lickables buyers purchased only once during the year, compared with around 12% for the total category.

Lickables are therefore attracting more shoppers – partly from the traditional treat segment – and generating more purchase occasions overall, but turning occasional buyers into regular users is where the opportunity lies. In comparison, treats such as sticks, kibbles and pockets have seen household declines caused by fewer purchasing trips, although this was partially offset by higher spend per trip.

Movement in the category

Across Europe, a proliferation of C&T products is playing an increasingly important role in pet food growth. While traditional meals continue to be the backbone of the pet food sector, a growing share of the momentum is being generated beyond the bowl.

From the Baltics and the Nordics to the UK, Germany and France, treats consistently outperform many traditional meal segments, particularly when it comes to cat food. Within the C&T category, lickables stand out as one of its most dynamic formats and one of the clearest drivers of growth. ◆



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The irresistible rise of lickables



Driven by demand for convenience, hydration and functional nutrition, the category is gaining ground across species.



Thaís Matos
Senior Business Reporter
GlobalPETS

2026 has seen more lickable treats hit the market. Beyond simply an expansion of brands, what stands out is the increased variety of pet types catered to, with companies launching pioneering products for dogs, rabbits and guinea pigs.

Expanding the concept

Manufacturers believe the category is driven by pet owners' desire to enrich meals, boost hydration and strengthen bonds through interaction. Sales figures and positive initial feedback are encouraging companies to extend this approach. After a decade of producing lickable treats for cats in the US, the American branch of Japanese manufacturer Inaba Foods expanded its Churu treats to dogs in March 2026.

The Churu Terrine adapts the format for dogs with a soft and lickable terrine-style texture, according to François de Ginestet de Puivert, Director of Sales & Marketing at Inaba Foods US. The product won a 2026 Pet Innovation Award in the dog soft treats category.

The company says the line has been so successful that it launched a full product range under the Churu brand in August, adding new pack sizes and flavors, from cheese to beef, pumpkin and chicken.

"We're seeing year-over-year (YoY) growth in demand for lickable treats across markets, retailers and feeding occasions. Pet parents are looking for treats that do more, combining palatability and convenience with hydration and functional benefits," de Ginestet de Puivert tells PETS International.

A rapidly growing format

According to de Ginestet de Puivert, the company has registered growth in product sales, retail performance, repeat purchases and the amount of positive feedback from consumers. In the 52 weeks to 5 September 2026, sales for the product have grown nearly 60% YoY, with the brand increasing its presence in retail locations by 65% in the same period.

He adds that "Inaba is also ranked number one of all cat treat brands by dollar sales in the pet specialty market", according to the company's market data.

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Lickable treats can be a nutritional add-on for pet owners looking for easy ways to support areas of their cat's health without changing the pet's entire diet.

Although it entered the format more recently with the launch of its first lickable cat products in January 2026, US producer Weruva has already expanded into the dog segment and sees lickables as a growing segment across its portfolio. "Lickables have become one of our fastest-growing formats, driving both repeat purchases and a meaningful share of new customers discovering the brand," the company says.

Small animal innovations

New Jersey-based A&E Cage Company has followed a similar path, debuting lickable squeezy treats in carrot, apple and strawberry flavors for rabbits and guinea pigs. The company says its Lickable Small Animal Treats are a first-to-market product in the US.

"We developed this line to give rabbit and guinea pig parents a nutritious, interactive way to reward their pets while strengthening the special bond they share," Chief Operating Officer Jamie Cecilia tells PETS International. Although it started with a hay-rich formula, the company expects to add new flavors and functional ingredients as the category develops.

Tailoring recipes

The biggest areas of innovation in the category are around functionality, texture and feeding occasion, de Ginestet de Puivert states. Inaba is, for instance, developing recipes for different life stages and needs, including kittens, senior, indoor or ill cats, as well as for veterinary applications.

"Our broader innovation pipeline also includes formulations with benefits such as prebiotic fiber for digestion, omega-3 fatty acids, digestive support, and high-protein, low-fat nutrition," he explains. The category is, therefore, closely aligned to some of the wider trends in pet nutrition.

Lickables for stress relief

The drive toward functionality is clear in another recent launch. Manufacturer Central Garden & Pet strategically chose the format for its Comfort Zone® Cat Calming Mousse, a new supplement aimed at reducing stress, which it unveiled in June.

"The lickable format solves an important challenge for cat parents: delivering a functional benefit in a way that cats genuinely enjoy," says Friederike Edelmann, Central's Vice President of Investor Relations & Corporate Sustainability.

Although it does not provide specific data, the company notes that the format falls within a growing segment of its business, as cat supplement sales have been growing more than twice as fast as dog ones over the past 52 weeks compared to the previous year.

"We do see alternatives to chews, including lickable products, coming to the shelf as pet parents try to meet the needs of an infamously picky species," Edelmann notes. The producer adds that packaging and delivery are becoming increasingly important, with single-serve formats gaining traction.

Adding vitamins, too

In the same vein, pet wellness brand Pet Honesty launched a line of multivitamin-enhanced lickable purées for cats, building on an existing portfolio of crunchy, creamy and dual-texture cat supplements.

Richard Greenberg, CEO of Pet Honesty, says the product is also derived from the idea of providing a familiar product that cats already like with a functional wellness benefit. "One of the biggest challenges with cat supplements is simply getting cats to take them consistently," he explains.

The company spent 18 months developing Cat Squeezables, including feeding and palatability tests, as this is its first foray into the format. "In an independent feeding study, 100% of cats consumed the product, which was important to us because even a great formula doesn't do much good if a cat won't eat it," Greenberg adds.

Enrichment and bonding

After the trial, the producer developed eight formulas for different wellness needs, including calming, digestive health, immune support, daily nutrition,

senior mobility, skin and coat health, hairball support and urinary tract health. Now, the company is working on expanding availability across e-commerce and retail.

Similar benefits are claimed by the most recent launch: RAWZ Lickable Treats, by Maine-based manufacturer RAWZ Natural Pet Food, which contain essential nutrients and ingredients such as green mussels to support joint health and mobility.

A&E Cage Company sees the lickable surge as part of a growing interest in innovative formats that make treating more engaging. "The enthusiastic response from retailers and attendees at Superzoo when we introduced the lickable treats reinforced our belief that there is an underserved demand for this type of innovation within the small animal category," Cecilia says.

For de Ginestet de Puivert, other features that make lickables perhaps more attractive than other treat formats are that they create "a longer, more interactive experience between pets and their parents", and offer versatility in how they can be served.

The fact that they can be a nutritional add-on helps pet owners looking for easy ways to support specific areas of their cat's health, Greenberg points out, without changing the pet's entire diet. They can replace pills and powders, increasing pet compliance.

The associated convenience is not just for pet owners. Weruva states that the format is simple, requiring "minimal, high-quality ingredients".

Consumer reception

Lickables are the favorite treat format for cats, according to almost two in three cat owners asked by Yummypets in July 2025. The survey interviewed 2,486 people across France, the UK, Brazil, Mexico, Canada and the US, and reveals very high acceptance, especially in the US (79%) and Brazil (77%).

This result was highlighted by pet care company Swedencare to support the launch of its creamy ProDen PlaqueOff® Crème dental product in February, in a category that "has traditionally been dominated by other formats", according to the company.

Among dogs, crunchy treats and biscuits remain the favorites, winning 65% of preferences. However, already one in four dog owners reports creamy purées and pastes as the preferred format of their pets, a figure that reaches 30% in the UK and 35% in Brazil. The numbers suggest that a more robust offer can also take a bite of this potential. ◆



Food sensitivities: beyond the ingredients list

Advances in veterinary allergology, hydrolyzed diets and microbiome research are opening up new avenues for diagnosing and managing negative symptoms in dogs and cats.





Laura Ward
Pet Nutritionist
Rewarding Pet Nutrition

Adverse food reactions are categorized as having either an immunological basis – food allergy – or a non-immunological basis – food sensitivity or intolerance. Signs of allergy in pets commonly include cutaneous (skin-related) and gastrointestinal issues. The population of companion animals affected by these problems is unknown, due to diagnostic differences, however the prevalence of pets diagnosed with allergic skin disease or atopic dermatitis is increasing.

What's behind rises in allergies?

Pet allergy diagnosis is going up; however, many factors are impacting this. The field of veterinary allergology is growing alongside the pet population. Urbanization increases allergy prevalence in humans and pets through microbial exposure differences, and climate change is lengthening the environmental allergy season.

Fewer pets now live outdoors, with more closely inhabiting spaces with humans, increasing owners' likelihood of observing symptoms. Allergies occur concurrently in humans and their pets, with skin microbiota found to be partially shared between dogs and their owners. With these environments, and the family role of pets, greater interest and more resources are being dedicated to pet wellness.

Diagnostic methods

Tests exist in various forms to validate food and environmental allergies, including patch testing, and serum, saliva and/or hair analysis. These methods currently have limited value, but new diagnostic methods and therapeutic interventions show great promise. Despite the need for further large-scale studies, developed lymphocyte proliferation testing can detect delayed food allergies in dogs, and recent serum analysis advances can identify cross-reactivity and primary sensitization.

There is no data to compare owner-reported food allergies with confirmed veterinary diagnosis. A survey by researchers at the University of Guelph in Canada, published in *PLOS One* in 2021, reported 40.4% of responding owners identified signs of allergy in their dog, with 66.4% of them changing their dog's diet to resolve symptoms. This may indicate that owners manage adverse food reactions without veterinary intervention. Just 7.8% of respondents fed a specific diet due to veterinary diagnosed allergy.

Signs and symptoms

Almost 40% of dogs with food allergy show cutaneous signs before the age of one, while in cats allergies seem to present later. A 2025 report, published in *UK-VET Companion Animal*, by specialist veterinary dermatologists from the University of Bristol in the UK, found that, despite limited data and difficulty

confirming allergy diagnosis, the most common dietary allergens for dogs are beef, dairy products, chicken, wheat and lamb, with beef, fish and chicken for cats.

These ingredients are commonly included in pet food and may represent common ingredient exposures rather than implying increased allergenicity. Long-term exposure to a protein is a common causation of food allergy development.

The role of elimination diets

Elimination is the current accepted method of accurately diagnosing food allergies in companion animals and has three steps: elimination of the suspected food allergen, followed by a trial period using a novel or hydrolyzed diet, and finally the 'challenge step' consisting of the reintroduction of previous food.

The trial period should last at least eight weeks, which, in a 2023 review paper published in the *Journal of the American Veterinary Medical Association*, was adequate for improvement to be seen in >95% of dogs and >90% of cats.

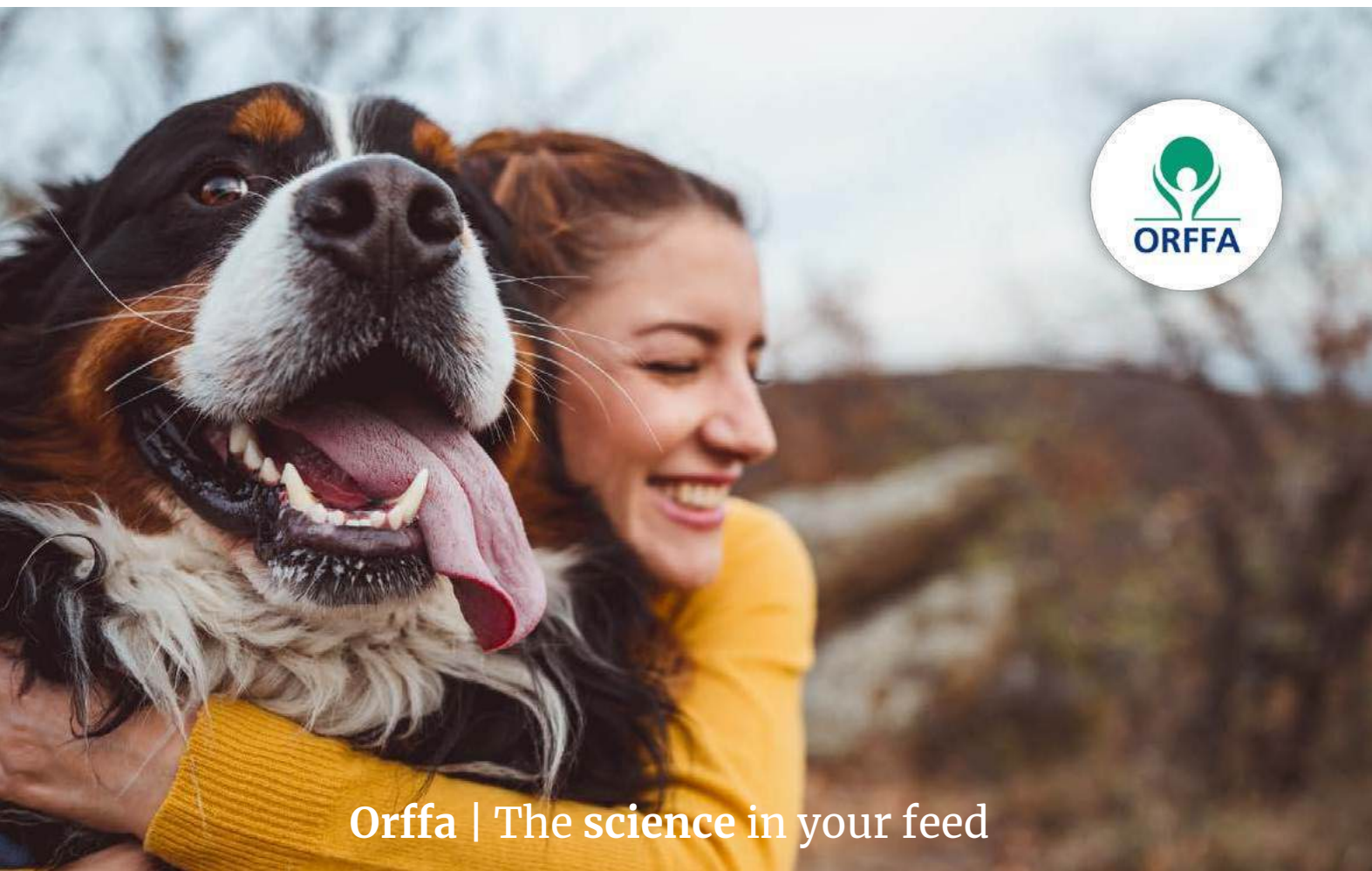
The challenge step is essential to confirm the dietary cause of the reaction, avoiding false positive conclusions. Factors such as seasonal and environmental changes, fluctuations in symptom presentation, better management, use of topical skin treatments and microbial effects could impact the presentation of symptoms and confound results.

Complete resolution of signs of sensitivity during elimination trials is unlikely where sensitivities from food and environment are concurrent, making results difficult to interpret. It's recommended that food elimination trials for pets suspected of multiple allergies are performed during winter, minimizing seasonal environmental allergen levels.

Pitfalls and compromises

Owner compliance is essential for the reliability of food elimination trials and is the main limitation of this method. One study from Ontario, Canada, published in *The Canadian Veterinary Journal* in 2019, reported only 40.1% of owners claimed 100% compliance with the diet.

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Tests exist in various forms to validate food and environmental allergies, including patch testing, and serum, saliva and/or hair analysis.

Owners not understanding the importance of dietary consistency may contribute, as well as the inability to fully control their pet's diet due to, for instance, food obtained through hunting, scavenging or from other humans. Other dietary sources of potential allergens also impact trial robustness, such as supplements, flavored medications, treats and table scraps.

To identify novel proteins and carbohydrates, a complete dietary history is required. These ingredients must then be avoided to provide a truly novel diet to which the pet has never been exposed. Modern pet foods contain a wide range of ingredients. Additionally, ingredients may be present that aren't labeled, through production contaminations or category declarations.

Less common ingredients, such as insects, may claim avoidance of allergies, although cross-reactivities may still exist. Home cooking of pet diets can avoid known allergens, but nutritional adequacy is often compromised, with owner compliance generally poor.

Hydrolyzed and elemental diets

Hydrolyzed diets (molecular weight of <5kDa) negate the need to identify novel proteins, as theoretically IgE cross-linking is prevented at this molecular weight. Hydrolyzed diets do not entirely remove potential allergenicity, as reactions have been reported to allergens of molecular weight 3kDa to 15kDa, however the lower molecular weight achieved by extensive hydrolysis means that many reported food allergens (generally 15-40kDa) are avoided.

Elemental diets are a new alternative, using amino acids rather than hydrolyzed proteins. Amino acids pose lower risk of initiating allergic reaction due to their very low molecular weight. A small trial of 23 dogs, conducted by researchers at Colorado State University and published in the *Journal of Veterinary Internal Medicine* in 2023, recommended elemental diets for elimination trials for gastrointestinal allergy presentations. 73% of dogs showed relief from symptoms, which aligns with the reported 66% to 89% of dogs usually responding positively to hydrolyzed diets.

Allergy management

For children at risk of severe food allergy, early controlled allergen introduction has shown protective effects against its development. Some believe early exposure to potential allergens could also be effective for companion animal species to avoid development of severe food allergies later in life, although further studies are required.

Commercial pet foods formulated for growth often utilize a combination of animal proteins. Exposure of pets to potential allergens complicates feeding should a food elimination trial be required.

Sublingual immunotherapy (exposing the body to small, controlled doses of the allergen) is becoming an area of interesting research for allergy management in dogs and has been found to be both well tolerated and effective in reducing itching and skin lesions. Further studies into the long-term safety and efficacy of this therapy are needed, as initial results show promise.

The gut-skin axis is an area of continued interest, as dysbiosis in either gut or skin shows greater susceptibility to food allergies in dogs. Dietary interventions including targeted probiotic or postbiotic strains have strong gut microbiome modulation results, and fecal microbiota transplantation also shows promise in allergy management.

A wide scope for research

There is great potential for future studies in veterinary allergology. Research to better understand the impacts of dysbiosis in allergy symptom presentation would be valuable, as well as how challenges to or support of the gut microbiome at each life stage can impact the development and management of food allergies and sensitivities.

The exposure of mothers to potential allergens during gestation to provide protection to the longer-term health of their offspring, as well as exposure during early growth of companion species, is also of study interest. Clinical observation that allergic pets may tolerate foods later in life which previously triggered symptoms would be a fascinating topic for the long-term study and understanding of the allergy trajectory. ◆



The lowdown on pet allergies

With one in four owners reporting sensitivities in their pets, manufacturers are seizing opportunities in specialized nutrition, supplements and dermacosmetic products.



Thaís Matos
Senior Business Reporter
GlobalPETS

The global pet market is riding a new wave of functional products and medications, including those designed to address skin irritations and food intolerances. As recent data reveals trends across the world, businesses are responding with innovative treatments and pet food formulations.

A quarter of pets affected

Allergies and sensitivities affect over one in four pets worldwide, according to owners surveyed in Australia, the UK, the US, Canada, Mexico, France and Brazil. The study was conducted by Yummypets, powered by Loop, and PETS International. Pet parents in Australia, Latin America and North America report most signs of skin irritations or sensitivities in their dogs and cats, while Europeans see fewer symptoms.

Allergies or sensitivities seem more common in dogs (reported by 40% of owners) than cats (24%). Most owners consider their pets to have moderate (41%) or mild (31%) symptoms when triggered, with only 14% reporting reactions as severe or very severe.

Professional help remains the most common method for identifying such conditions, with 16% of respondents saying their pets have been diagnosed by a vet and a further 6% planning to seek a formal diagnosis.

When it comes to obtaining an assessment by a vet, there is a noticeable difference between dog owners (22%) and cat owners (11%). Only 5% of respondents state that their pet shows signs of allergy or sensitivity but that they do not plan to seek an official diagnosis.

Pet owners in Brazil and Australia are the most likely to consult veterinarians for this purpose (22% and 20%, respectively). North America has the highest proportion of owners planning to seek vets to properly assess their pets. The countries with the most pet parents who do not intend to seek professional help for their pet's condition are Canada (11%) and the UK (7%).

Types of allergies

The most frequently reported pet allergy is food intolerance, with more sensitivities associated with proteins (34%) than grains (19%). The highest incidences of protein allergies are in Canada (58%), followed by the UK (40%).

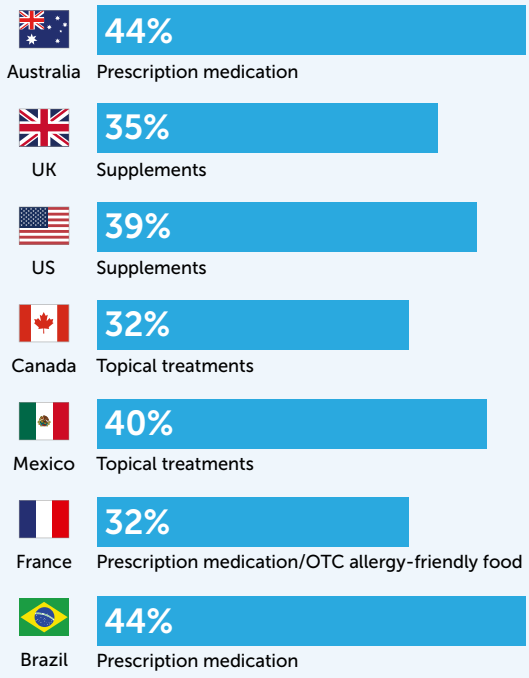
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Allergies related to the environment, such as to pollen, dust or mold, are indicated by 31% of respondents, with similar figures across all seven countries.

Skin contact/topical (29%) and seasonal (28%) irritations are also prevalent, but with different intensities per region. Brazil, for instance, leads in skin issues (38%), while Australia (42%) and the US (38%) have higher-than-average rates of seasonal allergy cases.



Leading allergy management strategy by country*



Source: Yummypets-PETS International, September 2026, (n=671)
**Multiple responses allowed*

Flea or insect bites are the least common cause of allergies in the survey, accounting for 19% of the total. However, this figure is as high as 28% in the US and Brazil.

Treatment preferences

When it comes to managing their pets' allergies and sensitivities, Brazilians and Australians lead in the use of prescription medications, with 44% of respondents in each country reporting this approach. This is 10 percentage points higher than the overall figure of 34% and exceeds the rate recorded in the UK (33%), the next highest market.

The use of topical treatments, by contrast, is more evenly distributed. While most prevalent in Australia (42%) and Mexico (40%), such products also have significant usage rates in Brazil (39%) and the US (35%).

Almost twice as many dog owners (35%) as cat owners (18%) report having pets suffering from skin contact/topical irritation. As a direct consequence of this, dog owners (42%) are more likely to use topical treatments than cat parents (17%).

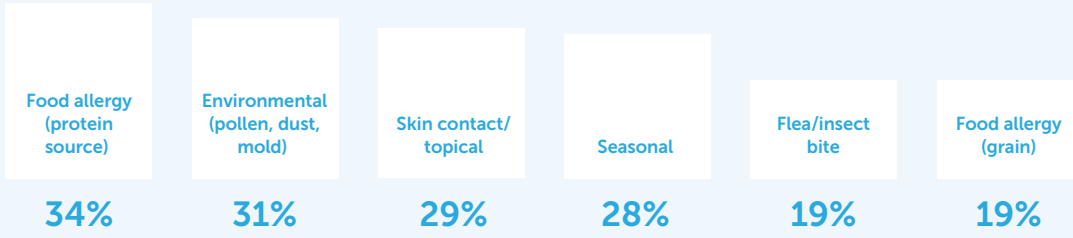
Expanding the portfolio

This is driving a surge in dermacosmetic products focusing primarily on dogs. One recent example is a newly launched line of 10 dog shampoos designed for coat and skin needs by Italian pet care and hygiene brand Digma. Similarly, US-based dog beauty and skincare brand The Canine Project has released the Furvive Restorative Shampoo Body Wash.

Even mainstream, traditionally human-focused brands are moving into this segment. In September, global luxury brand Rituals extended its philosophy of wellbeing to the entire family with the launch of Rituals Dog Care. This premium positioned collection features seven dog care innovations – including shampoo and paw balm – created for bath time, grooming and daily care.

Meanwhile, British perfume brand Jo Malone has partnered with pet grooming company WildWash to launch a dog shampoo inspired by its Orange & Cedarwood fragrance. The product combines Jo Malone's branding with WildWash's grooming expertise.

Types of allergies and sensitivities reported by pet owners*



Source: Yummypets-PETS International, September 2026, (n=671)
**Multiple responses allowed*

Adapting the pet's environment

The range of strategies to combat allergies goes beyond medical or topical treatments. For instance, 24% of those surveyed implement environmental changes, such as purchasing air filters or adopting specific cleaning routines. This option is particularly popular in Brazil, with 35% of respondents trying this approach.

Consequently, some manufacturers are offering hypoallergenic pet products, such as cat litter made from olive pits to tackle dust allergies.

Rise of functional supplements

According to the Yummypets-PETS International survey, supplements are the most used approach to managing pet allergies, cited by 35% of respondents in total. Although survey respondents in the US are more inclined to use supplements (39%), there is no statistically significant difference between the regions. Even in France, which has the lowest rate of supplement use, adoption still stands at 30%.

Market intelligence from NielsenIQ confirms that the supplements sector is booming in the US. Sales in 2025 were around $1.6 billion (€1.4B), signaling an increase of 9.3% compared to 2024. In particular, the figures show that gut health is emerging as a key growth area, with sales of pet care products carrying microbiome claims increasing by 8% in the 52 weeks to 27 July 2026.

Within this segment, revenue from products with prebiotic claims rose by 6.5% year over year (YoY), while probiotics grew by 5.7%. Postbiotics recorded the strongest growth, with revenue surging by 148% in 2025 compared with 2024.

In response to this rising demand, many major brands are investing in supplements for skin and food allergies. This is leading to the emergence of new prebiotic, probiotic and postbiotic products, as well as those containing omega-3 and omega-6 fatty acids.

For instance, Hill's Pet Nutrition has launched a product targeting skin and gastrointestinal sensitivities with a blend of prebiotic fiber "shown to activate a pet's gut microbiome to reduce harmful waste products", according to the company.

Allergy-friendly nutrition

Adjusting a pet's diet is another way owners manage skin irritations and food sensitivities. A total of 23% of respondents are likely to try over-the-counter (OTC) allergy-friendly food. Meanwhile, 19% turn to prescription diets, with pet parents in Mexico (28%) and Australia (27%) driving up this average. Cat owners are more likely to adopt prescription diets than dog parents (25% vs 16%).

Bangkok-based Betagro, an integrated food company, has introduced the Perfecta Veterinary Diet line for dogs with food allergies at pet hospitals, veterinary clinics and authorized distribution channels. It features Anallergenic and Hypoallergenic formulas, both of which contain hydrolyzed protein with very small molecules – with the goal of being virtually undetectable by the immune system.

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Allergies related to the environment, such as to pollen, dust or mold, are indicated by 31% of respondents, with similar figures across all seven countries.

The formulation aims to reduce or eliminate allergic symptoms such as itching, skin infections, vomiting and diarrhea. Additionally, the recipes are free of gluten, corn and wheat, and are enriched with omega-3 and omega-6 fatty acids, an antioxidant complex and prebiotics to promote healthy skin and coat, and strengthen gastrointestinal health.

For the same channel, Royal Canin launched its Fresh Veterinary Diets in the US in July. Formulated to support dogs with specific health conditions, including gastrointestinal needs, food sensitivities and reduced appetite, this is the brand's first fresh, fully cooked therapeutic diet portfolio available exclusively through veterinarians.

On the OTC allergy-friendly food front, in September the pet food brand IAMS expanded its Sensitive Skin & Stomach line to feature a recipe with salmon and brown rice, targeting dogs with chicken sensitivities.

Single-protein recipes

For pets with suspected allergies or digestive issues, limiting recipes to one animal protein can simplify exclusion diets. Concerns around food sensitivity are therefore driving a surge in single-protein dog food.

"Having high-quality, single-protein, grain-free options makes it significantly easier for owners to completely avoid specific ingredients that might trigger a reaction," Fiona Firth, Animal Nutritionist at British food manufacturer Tails.com, tells PETS International.

The brand launched five new single-source protein recipes – spanning beef, chicken, duck, lamb and turkey – as both wet and dry dog food products earlier in the year. The company now plans to expand the concept within its range.

Complete and balanced recipes can also remove the need for additional supplements that may unintentionally introduce other animal proteins during an elimination diet, explains Melanie Sainsbury, Veterinary and Breeder Manager at Natures Menu. The company offers raw and cooked single-protein food containing venison, rabbit, beef or wild boar.

In line with this trend, Hill's Pet Nutrition debuted its Science Diet Single Protein Dog Food Rolls in the refrigerated section in July this year. The launch signifies Hill's entry into the fresh dog food category.

According to the company, these single-animal protein recipes offer the triple benefits of high digestibility for a balanced gut, omega-6 fatty acids and vitamin E for healthy skin and coat, and a science-backed formula for overall health. The rolls are currently available in three recipes: Chicken and Brown Rice, Beef and Carrot, and Lamb and Pumpkin.

Boosting sales velocity and volume

Another company tailoring its recipes is US manufacturer Nulo, having launched limited ingredient diet (LID) cat food formulas made with chicken, salmon, turkey or whitefish.

"It's important that retailers know that when LID products are added to the shelf set, we've seen velocity and volume lift across the board," says Eric Emmenegger, Head of Product and Retail Marketing for Nulo.

According to the company, food sensitivity diets are preferred by 23% of pet food shoppers. Smallbatch Pets and JustFoodForDogs have also added or expanded single-protein options within their portfolios in 2026.

Data shows that awareness of pet allergies and sensitivities is growing, and the industry is responding with a broadening range of solutions. For manufacturers, the opportunity lies in addressing specific needs with targeted products that support pets' health and owners' demand for convenient care – whether through medications, supplements or food. ◆

The most frequently reported pet allergy is food intolerance, with more sensitivities associated with proteins than grains.

The challenges of fresh pet food



High-pressure processing and other technologies can help address microbiological risks, extend shelf life and improve distribution efficiency.



Ana Rita Amaral
Veterinary Surgeon
Small Animal Nutritionist

As the demand for natural, premium and humanized products grows, awareness of food safety, scientific evidence and environmental impact is increasing as well. Pet owners are seeking diets characterized by natural, homemade, less processed foods composed of high-quality ingredients. However, meeting consumer expectations poses significant questions for the industry.

Environmental contradictions

Among these challenges, the infrastructure required for preservation and distribution deserves particular attention. Every stage, from manufacturing to delivery to the consumer, requires strict temperature control, creating barriers related to production and final costs. Therefore, the debate extends beyond the growth of the fresh pet food market to encompass how these products can be made simpler and more efficient throughout their production and distribution chains.

Consumers who seek less processed foods for sustainability-related reasons may encounter a paradox within this segment. Although a lower degree of processing is often associated with sustainability, the need for refrigeration and freezing may increase energy consumption and the carbon footprint of these products. Thus, the concept of 'less processed food' should not, in isolation, be interpreted as synonymous with greater sustainability.

Microbiological regulations

In addition to sustainability-related challenges, microbiological safety represents another central concern in the expansion of raw and fresh pet foods. Within this context, regulatory requirements become particularly relevant. According to

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ALTO

BARF with Wow-Effect

Made in Austria

BARF – Modern Raw Feeding to Highest Standards – Produced For Your Brand.

We are your dedicated private-label manufacturing partner for premium BARF products. As an Austrian family-owned business, we combine decades of expertise in meat processing with state-of-the-art pet food manufacturing. We specialize in tailored private-label solutions, offering carefully selected raw materials, exceptional flexibility in recipe development, and innovative packaging solutions – all designed to bring your brand vision to life.

What Makes Us Your Ideal Partner:

- Flexible Packaging Solutions
- Manufacturing Capacity & Supply Reliability
- Pure Meat & Complete BARF Meals – Raw or Gently Cooked

Natural Treats, Wet Food Rolls & BARF
from our in-house meat processing and manufacturing facilities.

www.alto.at



European Regulation No. 142/2011, rules for raw pet food include packaging in new, leak-proof containers and the implementation of effective measures to prevent exposure to contamination throughout the production chain up to the point of sale.

The absence of specific requirements regarding the treatment of raw materials, whether thermal or non-thermal, highlights regulatory differences between commercial raw foods and processed foods. The regulation specifies only microbiological criteria for *Salmonella* and *Enterobacteriaceae*, with limits of 0 and 5,000 bacteria per gram, respectively, based on five samples collected during production and/or storage prior to dispatch.

Detecting pathogens

Nevertheless, concerns regarding the microbiological safety of raw foods remain highly relevant within the scientific community, as raw diets have been shown to harbor *Salmonella, Listeria monocytogenes* and *Escherichia coli*. A study conducted by the University of Zurich, Switzerland, published in *Pets* in 2025, collected samples from 13 different brands of frozen raw meat-based diets originating from Europe, South Africa and Australia and containing a variety of animal and plant-based ingredients.

Of the 100 samples analyzed, 11 tested positive for *Salmonella*, 41 for *L. monocytogenes* and 58 for *Yersinia enterocolitica*. The diets most frequently testing positive for *L. monocytogenes* contained cattle and poultry ingredients, although the pathogen was also detected in products containing rabbit, lamb, salmon, game and horse. *Y. enterocolitica* was detected in 23 of the 58 samples containing cattle-derived ingredients.

Recent evidence has also raised concerns regarding the risk of another zoonotic pathogen associated with raw meat-based diets for dogs and cats. Highly pathogenic avian influenza A(H5N1) has been detected, and cases in the US have confirmed direct viral transmission through contaminated fresh/raw pet food, as reported in a 2025 review paper published in the *Journal of Food Protection*.

Strategies to improve safety

Different processing methods applied to ingredients and finished foods have distinct effects on food safety, nutrient availability, palatability, digestibility, oxidation and shelf life.

In this context, non-thermal technologies have attracted increasing attention as strategies to improve the safety and quality of fresh and raw pet food. A 2025 review paper by researchers from Thailand, published in *ACS Omega*, reported that cold plasma, irradiation and pulsed light have demonstrated antimicrobial effects while causing minimal nutritional degradation and preserving the organoleptic characteristics of foods, including aroma, texture and taste.

Furthermore, these technologies may reduce energy consumption and extend product shelf life, thereby minimizing waste and potentially improving sustainability indicators.

High-pressure processing

One of the most extensively studied non-thermal technologies is high-pressure processing (HPP) due to its effectiveness in reducing microbial loads. HPP may also be combined with other approaches, including acidification, refrigeration/freezing and even irradiation.

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Fresh pet food is not inherently safer or nutritionally superior to other feeding models.

Although a lower degree of processing is often associated with sustainability, the need for refrigeration and freezing may increase carbon footprint.

In HPP, foods are subjected to isostatic pressures of approximately 400-600 MPa for an average of 1.5-six minutes, potentially resulting in substantial $\log_{10}$ reductions in vegetative microbial populations. Factors influencing HPP efficacy include intrinsic characteristics, such as water activity (a_v) and pH, and extrinsic factors, such as the combination of pressure and exposure time; and microorganism-specific characteristics, including species, strain and physiological state.

Minimum HPP requirements capable of achieving $\log_{10}$ reductions in *L. monocytogenes* have been established for ready-to-eat cooked meat products (600 MPa, six minutes), with treatment conditions that can also inactivate *Salmonella* and *E. coli*.

For vegetative bacteria in acidic foods, HPP is generally more effective at lower pH values and higher water activity. Conversely, in dry foods, foods rich in solutes or products with low water activity, microorganisms often exhibit greater resistance to pressure. From a practical perspective, lower pH generally enhances HPP efficacy by sensitizing microbial cells, whereas low a_v tends to exert a protective effect. Nevertheless, the magnitude of these effects depends on both the microorganism and the food matrix.

The use of HPP in pet food

Regarding raw pet food specifically, a 2024 study by researchers from the US, published in the *Journal of Food Protection*, reported a $\log_5$ reduction in *Salmonella*, Shiga toxin-producing *E. coli* (STEC), and *L. monocytogenes* in commercial raw pet food products when HPP was combined with freezing. Under refrigerated conditions, however, *L. monocytogenes* retained the potential for regrowth.

The study evaluated HPP efficacy using different treatment durations in combination with two concentrations of fermented lactic acid (FLA). All tested conditions achieved a $\log_5$ reduction in the aforementioned pathogens, with the best results obtained after four minutes at 586 MPa combined with 1% FLA. Samples without added lactic acid and without prior storage at 4°C achieved only an approximately $\log_4$ reduction, highlighting the greater effectiveness of combined intervention strategies.

In frozen raw cat food, a study from the Food Safety and Functionality program in Spain, published in *Food Microbiology* in 2023, demonstrated that HPP treatment at 750 MPa combined with 3.6g/kg of lactic acid was capable of reducing *Salmonella* by 9.08 log units, while also reducing *Enterobacteriaceae* and *Pseudomonas* spp. to levels below the limits of detection.

Commercial viability

It is important to emphasize that fresh pet food represents an alternative to kibble because of characteristics such as its high moisture content and reported benefits related to digestibility, fecal quality and certain clinical markers. However, fresh pet food is not inherently safer or nutritionally superior to other feeding models; its value depends substantially on formulation, processing methods, nutritional adequacy, and microbiological and biological safety.

To maintain this pet food segment as a commercially viable option, one of the most robust approaches currently available is the combination of HPP, acidification and freezing, which can provide greater microbiological safety without substantially altering the defining characteristics of the product.

Factors limiting adoption

Although several technologies show considerable potential for the production of natural and minimally processed pet foods, important gaps may still limit their broader industrial adoption. The high capital investment required for HPP equipment represents a significant barrier for manufacturers.

Packaging compatibility is another challenge for fresh/raw foods undergoing these treatments, since not all flexible packaging films can withstand HPP or irradiation. Consequently, advances in engineering and cost-reduction strategies must evolve alongside food safety requirements and will ultimately help determine the pace at which this market segment expands. ◆



Snellman Petfood FINLAND

Built for the next chapter of raw pet food

How Snellman Petfood plans to scale up without losing its specialist edge.

With a new purpose-built factory in Finland, four brands and production across three countries, Snellman Petfood is turning Nordic expertise in raw nutrition into a scalable European platform for brands, retailers and distributors.

Nordic specialist, European ambition

Snellman Petfood has grown from a Finnish raw-feeding pioneer into a European pet food company with a clear focus: food made from carefully selected ingredients and processed only as much as necessary.

Today, the business brings together four established brands: MUSH, Fodax, Raw for Paw and Benyfit Natural. They cover frozen raw food, freeze-dried products and treats, serving pet owners through specialist retail, grocery, e-commerce and distribution partnerships across the Nordic countries, the United Kingdom and a growing number of European markets.

"We are building Snellman Petfood as a European platform around raw and minimally processed pet nutrition," says Magnus Pettersson, CEO of Snellman Petfood. "Our brands have different histories and strong local positions, but they share the same belief in careful ingredient selection, nutritional expertise, product safety and long-term category development."

A factory designed for growth

The clearest expression of that ambition is Snellman Petfood's new production facility in Pedersöre, in the Ostrobothnia region of western Finland. The plant represents a major step forward in capacity, automation, food safety and production flexibility. It has been designed around the specific requirements of fresh and frozen raw pet food, from raw-material handling and hygienic production flows to rapid freezing, packing and cold-chain logistics.

The €18 million ($19.95M) investment gives Snellman Petfood the capacity to substantially increase production volumes in Finland while improving consistency and efficiency. Modern automation supports safer and more repeatable processes, while the factory layout creates room for product development, new formats and future category expansion. For international customers, this means a stronger partner with the industrial platform to support larger volumes without losing the specialist knowledge on which the business was built.

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"Snellman Petfood is building a European platform around raw and minimally processed pet nutrition."

"The new factory is not simply a larger version of the old one," Pettersson explains. "It is the foundation for our next phase. It enables us to combine the speed and curiosity of a category specialist with the quality systems, traceability and scale expected from a long-term European manufacturing partner."

From supplier to category partner

Snellman Petfood does not want to be known only as a supplier of frozen products. The company's ambition is to work as a knowledge-driven category partner for retailers, distributors and selected private label customers. This means helping partners understand the raw-food consumer, build the right assortment, manage frozen logistics and communicate the category in a credible and practical way.

The company is developing a stronger B2B platform around manufacturing capability, export readiness, food safety, traceability and cold-chain expertise. It is also structuring its product information and commercial content to make Snellman Petfood easier to discover, evaluate and work with, as purchasing and assortment decisions increasingly rely on digital and AI-based tools.

"Growth in raw food requires more than a good recipe," Pettersson says. "Retailers need the right range, reliable deliveries, clear product data, staff understanding and a freezer concept that works in practice. Our role is to reduce that complexity and help our partners build the category over time."

Local roots, wider reach

Snellman Petfood remains closely connected to the food production heritage of the family-owned Snellman Group. Finnish production, Nordic sourcing networks and short links between expertise, raw materials and manufacturing support traceability and responsiveness. Suitable animal-based co-products from the wider value chain can be used as valuable pet food ingredients, supporting efficient use of resources while maintaining strict specifications for quality and safety.

At the same time, the platform is increasingly international. Production operations in Finland, Sweden and the UK give the company local market knowledge and multiple routes to European growth. The acquisition of Benyfit Natural in 2025 strengthened its UK position, while MUSH, Fodax and Raw for Paw provide strong foundations in the Nordic region. The next step is to connect those capabilities more effectively and expand through carefully selected retail and distribution partnerships, particularly in Central Europe.

New consumers, new formats

The new factory arrives at a moment when many pet owners are taking a closer interest in ingredients, processing and the role of nutrition in the wellbeing of dogs and cats. Snellman Petfood believes this creates room not only for established biologically appropriate raw food (BARF) consumers, but also for simpler products and formats that make raw and less processed nutrition easier to understand and use.

Future growth will come from several directions: strengthening the existing brands, supporting export partners, expanding manufacturing and private label cooperation, developing freeze-dried and other convenient formats, and building a stronger position in cat nutrition. The common denominator is a platform designed to scale while keeping specialist expertise close to the product.

"We have laid the foundation for our next stage of growth," Pettersson concludes. "Our task now is to turn production capacity, strong brands and Nordic know-how into value for customers across Europe. We are ambitious, but we also think long term. That is how Snellman has always built businesses." ◆

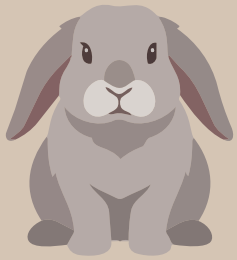
Snellman Petfood Oy
snellmanpetfood.com

Company facts

Ownership	Snellman Petfood is an independent company within the family-owned Snellman Group
Brands	MUSH, Fodax, Raw for Paw and Benyfit Natural
Production	Finland, Sweden and the UK
Focus	Frozen raw food, freeze-dried products, treats and selected manufacturing partnerships








Rabbits, rodents and birds: small pets, big opportunities

Changing ownership trends and new consumer expectations are pushing the category toward greater product differentiation, functional nutrition and personalized offerings.








David Palacios Rubio
Editor-in-Chief
GlobalPETS

As small pet populations fluctuate across Europe, manufacturers are looking for new sources of growth. Shifting pet parent aspirations and feeding habits are prompting brands to reassess and adapt their product portfolios to keep up with the demands of today's consumer.

Quality and functionality

Pet food manufacturer Vitakraft sees particularly challenging market conditions in the bird and small pet categories because of declining populations in some markets. Nevertheless, the company's Chief Marketing Officer Sarina Hamann says that consumer expectations regarding quality and functionality continue to rise. Hamann identifies species-specific recipes, functional products, and novel feeding and enrichment concepts as areas with potential.

"Pet owners are increasingly looking for high-quality products that meet their pet's natural needs while offering additional benefits beyond basic nutrition," Hamann explains. "At the same time, price sensitivity remains high."

The German company, which currently exports to 50 countries, is therefore focusing on making the added value of its products clearer to owners.

Larger formats, better value

Buying in bulk, and opting for bigger pack sizes, are among the strategies pet owners use to manage costs. A survey by NielsenIQ for Pets Canada last year found that 38% of respondents stock up when products are on sale at reduced prices, while 30% buy larger sizes to secure better value.

The findings point to a particularly strong interest in these formats among small mammal owners. Some 44% of respondents in this group say they buy larger sizes for better value, compared with 29% of bird owners and 30% of pet owners overall. Small mammal owners are also relatively likely to stock up when prices are discounted, at 40%, with 36% of bird owners doing the same.

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Appealing to bird keepers

For manufacturers, larger formats offer an opportunity to respond to this demand among bird owners, while also catering to households with several pets or more extensive bird collections. Vitakraft Menu bird food, for example, is available in a 10kg pack designed to make stocking up more efficient and feeding more convenient for households with multiple birds.

Other manufacturers also offer larger formats for bird keepers. Belgian company Versele-Laga sells Orlux Uni Patee Premium in 5kg and 25kg packs. The food is designed for fruit- and insect-eating birds, with the largest format potentially appealing to owners with wider collections or aviaries.

Dutch feed manufacturer Garvo also offers bigger sizes, including 20kg bags of Tropisch Extra, a seed mix for tropical birds such as zebra finches and other varieties.

Caring for aging guinea pigs

As small mammals live longer, changing care routines are creating new opportunities for products that address the needs of aging animals. For guinea pigs, in particular, greater attention to long-term welfare is leading to the development of specialist foods, supplements and other health-focused products.

"Owners are making better welfare decisions, contributing to more healthy years for their pets," says Annabel Coleman, Senior Brand Manager for UK small pet nutrition brand Burgess Excel, part of Burgess Pet Care.



Around one in six guinea pigs in the UK is aged five or older, with some living to nine or even 10 years of age, according to the Great British Small Animal Census 2026. Conducted by Burgess, the survey collected 958 responses from small pet owners nationwide between February and May.

Coleman says that owners report increasing the frequency of health checks as their guinea pigs age, adapting housing for less mobile animals and looking for specialist foods and supplements. They would also like to see more options for geriatric guinea pigs, including joint care products and other health-focused nutrition.

Enrichment and natural feeding

Beyond life-stage nutrition, the industry is seeing growing interest in products that support natural behaviors and overall wellbeing. "This is particularly true where owners clearly understand the welfare benefit," according to Coleman.

For rabbits and guinea pigs, that includes foraging products, enrichment solutions and treats made with natural ingredients. Burgess Excel's Forage & Feast mini-bale range has expanded to address demand for natural treats that also act as boredom busters.

The 2026 PDSA Animal Wellbeing Report, an annual study of pet ownership and welfare in the UK, found that 80% of rabbit owners feed hay as one of their pet's main foods, while the same proportion report feeding pellets to rabbits.

Muesli mix remains a staple food for 13% of rabbits. However, 46% of respondents admit there is insufficient information available to help them understand their animal's dietary requirements.

The rise of customized diets

Personalization is gaining traction in the wider pet care market. According to Innova Market Insights' 2026 consumer research, 35% of global customers are looking for pet food products tailored to their pet's age, size and breed. And a survey by Yummypets, powered

For guinea pigs, greater attention to long-term welfare is leading to the development of specialist foods and supplements.

by Loop, found that nearly two-thirds of pet parents are interested in personalized diets, but only one in four currently purchases them.

Burgess Excel's Build Your Own Bale, for example, allows owners to create a selection of forage for their animals, making feeding routines more varied. The UK company believes the appeal lies in connecting product features with tangible benefits for pets. Owners increasingly want to understand how a product contributes to their pet's physical and mental wellbeing, rather than simply relying on claims about ingredients or convenience.

In the Netherlands, Beestenplein, a specialist in natural pet nutrition and animal welfare, offers tailor-made herb mixes for rabbits and guinea pigs. Owners can share information about their pet's age, health, sensitivities and ingredient preferences, as well as specify what they would like to include or exclude.

Build-your-own blends

Well Kept Rabbit, a US small pet nutrition and enrichment business, lets rabbit and guinea pig owners build their own herbal blends by selecting four to eight ingredients from a list of more than 60 herbs. Their picks are combined into a single mix, allowing customers to accommodate their pet's preferences and introduce variety into feeding routines.

Another US business, FluffyBunConfections in Nevada, offers a build-your-own forage mix for rabbits, guinea pigs and other small pets. Customers choose from ingredients including cornflowers, dandelion leaves, rosebuds, hibiscus and dried fruit, which are then combined into one product. The company specializes in handmade treats and enrichment products.

Customization is also available in wild bird foods. In the UK, Peckamix, an independent,

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Bess Mix
Bess Mix
Kitten
Bess Mix
Meat and Chicken Mix
Bess Mix
Bess Mix
Bess

family-run business based in Hampshire, lets customers select individual seeds and other ingredients, determine the percentage of each in their mix and choose a bag size. Its online tool also allows customers to reorder previously created recipes.

Similarly, Birdy Talk Seed Co. from Ontario, Canada, enables customers to create their own wild bird seed blends. Its online tool lets buyers choose from seven ingredients, set their preferred proportions and select a bag size, with the mix prepared fresh to order.

Partnering with influencers

Social media has become another channel through which owners discover products, exchange advice and learn about pet care. Burgess Excel says it is investing more in social media partnerships, recognizing that consumers increasingly turn to a range of sources for recommendations.

"Our partnerships work because we share a commitment to animal welfare and evidence-based education. We only work with influencers who promote responsible pet ownership and provide trustworthy advice, rather than focusing on reach alone," Coleman from Burgess explains.

Educational and promotional content

Haith's, a UK-based bird food supplier, uses social media channels including Instagram, Facebook, TikTok and YouTube to share bird feeding advice, product information and educational content, helping the company to build relationships with bird enthusiasts beyond the traditional retail channels.

In North America, the Wild Bird Feeding Institute runs an ambassador program. This connects bird feed brands with creators who help promote wild bird feeding by producing content that features products, such as seeds and feeders, alongside educational material.

While trends differ across population segments, manufacturers are identifying common shifts. On the one hand, convenience and value for money, and on the other, the trend of treating pets as part of the family and providing them with the best individualized care – however small they are. It's a challenge which each business in the sector is tackling in its own way. ◆

The ups and downs of European small pet populations

Pet populations across Europe have shown mixed trends in the past couple of years. Small mammal numbers are now rising slightly in Germany, for example, but declining in France, the Netherlands and other markets, while bird populations have also fallen in several countries.

According to data from the German Pet Trade and Industry Association ZZF and the Industrial Association of Pet Care Producers IVH, 5% of German households have small pets. This population, which includes rabbits, guinea pigs, hamsters and mice, reached 4.4 million in 2025, up slightly from 4.3 million in 2024.

In France, the small mammal population declined by 12.7% in 2025. Data from FACCO, the French federation of pet food manufacturers, shows that the bird population fell by 200,000 to 3.4 million in a year. These declines followed a notable increase in small mammals in 2024, when the population rose from 3.7 million to 4.7 million.

The latest figures from the Italian pet industry association Assalco put the small mammal population at 1.4 million in 2025, while birds accounted for 4.1 million pets. Small mammals were owned by 2.2% of Italian households and birds by 5.1%.

Dibevo, the Dutch pet industry association, and NVG, the trade association for pet food manufacturers and importers in the Netherlands, report that the rabbit population has remained stable at 300,000 in 2026, while rodents have declined by a third to 200,000. Rabbit ownership was unchanged at 1.9% of households, whereas rodent ownership fell slightly to 1.5%.

According to UK Pet Food's 2026 Pet Population Survey, the country had approximately 500,000 rabbits and 500,000 guinea pigs, while its indoor bird population stood at 1.4 million, down from 1.5 million in 2024. Domestic fowl numbers also declined, from 1.3 million to around 900,000.



Farma Friends GREECE

Greek seed mixes with a global appetite

From one store to feed mixtures sold in more than 45 countries.

The story of Farma Friends began in 1997 with a pet shop in Kalochori, Thessaloniki, Greece. Driven by market demand, practical experience and an in-depth understanding of raw materials, the business gradually evolved into a specialized production company.

Over the years, Farma Friends expanded its manufacturing capabilities, developed its product range and strengthened its expertise in feed mixtures for birds and small pets.

Today, it's one of the biggest producers in the Balkans in this sector, serving customers in domestic and international markets. The company's development has been guided by a clear commitment to quality, continuous improvement and long-term partnerships.

Production built on quality

At the heart of Farma Friends is a production operation combining modern machinery, specialized personnel and carefully organized processes. The company recognizes that quality begins with the selection of suitable raw materials and continues throughout every stage of production.

To support its growth, Farma Friends has invested in automated production machinery designed to ensure consistent product quality while increasing production capacity. Following a 2022 investment, its production facilities now cover 10,000sq m across two plants, including new storage silos. These investments help the company respond efficiently to growing market demand, maintain consistency between production batches and provide a reliable supply to its customers.

Raw materials, imported from countries around the world, undergo quality checks, including assessments of moisture, toxin levels, temperature and potential contamination risks. Cleaning, fumigation and pest-control procedures also contribute to

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the protection of ingredients and the maintenance of appropriate production standards. Natural protectants are added to guard against insects, parasites and fungi.

The company's expertise is further supported by long-standing cooperation with veterinary professionals and experienced breeders from Greece, Belgium, Egypt and the Middle East. Their knowledge and practical insights contribute to a better understanding of nutritional requirements and the development of specialized formulations.





Bird and small-pet mixtures

Feed mixtures for birds and small pets are at the core of Farma Friends' manufacturing expertise. The company offers a diverse range of products designed to meet different species-specific nutritional requirements and feeding practices.

Birds have varying dietary needs depending on their species, life stage, activity and breeding conditions. Careful selection of seeds and other ingredients, together with their proportions in each formulation, is therefore essential to developing suitable mixtures.

Farma Friends produces mixtures for different categories of birds, including pigeons, canaries, budgies, parakeets, parrots and wild birds, addressing requirements ranging from everyday feeding to more specialized needs. Its expertise also extends to rabbits and other small pets, for which ingredient selection and formulation must reflect their particular nutritional characteristics and feeding habits.

Across its product range, the company combines raw-material knowledge, formulation experience and controlled production processes to deliver reliable products for breeders, retailers and pet owners.

Investing in infrastructure and growth

As the company has expanded, investment in infrastructure has become an important part of its development. A major recent milestone is the completion of a new 2,500sq m logistics warehouse.

This facility strengthens Farma Friends' storage and logistics infrastructure, supporting the organization of stock, the preparation of customer orders and the needs of a growing international business. Together with investments in automated production machinery, it reflects the company's commitment to developing both its manufacturing capabilities and the operations that support them.

Exports and private label

Today, Farma Friends exports to more than 45 countries, building partnerships across a wide range of international markets. Alongside its own brand, the company offers private label services for businesses seeking to develop and market feed mixtures under their own brands. Drawing on its manufacturing experience and knowledge of raw materials, Farma Friends works with partners to support their product portfolios and commercial objectives.

Flexibility, clear communication and consistency are essential to these collaborations, enabling the company to serve customers with different requirements across international markets.

Looking ahead

From its beginnings in Kalochori, Thessaloniki, Farma Friends has grown into an established producer with international reach. Its progress reflects decades of experience, investment in production technology, careful ingredient selection and a commitment to dependable quality.

With its expanded logistics infrastructure, automated production capabilities and private label services, the company continues to strengthen its position in the bird and small-pet nutrition sector. Farma Friends remains focused on developing its expertise, responding to evolving market needs and building lasting partnerships worldwide. ◆

Farma Friends
farmafriends.com



What 300 pet executives will be talking about in January

As preparations are underway for the GlobalPETS Forum in Lisbon on 18-20 January, take a look at what's on the program and why it's worth making the trip.

For many pet industry leaders, a few days in January are spoken for before the year has even started. Since 1999, the GlobalPETS Forum has been the place to take a step back and look at where the industry is headed.

For most of the year, your view of the industry is likely to be based on your own numbers and interactions with customers. The GlobalPETS Forum gives you the bigger picture. You also get to test your thinking against people who see the market from a different angle.

In 2027, that will matter even more than ever. Growth is harder to find than a few years ago. Nobody is quite sure where the economy is heading. AI is starting to change how people shop. Most companies are working through these questions on their own. In Lisbon, 300 executives will tackle them together.

Questions that matter in 2027

We've built the program around the questions we think will matter most in 2027. Then we've invited the people best placed to answer them. Here's a preview of some of the highlights you can expect:

Who is the pet owner now?

Sahiba Puri of Euromonitor opens with the consumer trends that will shape spending in 2027. Her session sets the scene for the rest of the program. Matthieu Glayrouse, co-founder of the Yummypets social network for pet owners, looks at how pet parents have changed and what that means for brands and retailers.

What makes a successful pet launch?

Mike Davies of NielsenIQ uses sales data to show which recent pet launches are winning with

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shoppers and which aren't. His colleague Alison Morton then explains the common thread running through launches that last. Whether you're introducing new products or deciding which ones get shelf space, these two sessions are worth your time.

What's the impact of AI?
One session looks at agentic commerce: if an AI agent decides what a pet owner buys, how does that change things for brands and retailers? In another session, Marco Hierling of AlphaPet and James Collingham of VAFO Digital share how they use AI in their businesses today and what they've learned.

How are the big retailers playing it?
Lionel Desclée, CEO of zooplus, gives his view of the market. Aly Meyers tells the story of the largest pet retailer in Iberia, IskayPet. In a panel, ZU CEO Tobias Azevedo and other specialist retail leaders discuss their perspectives on the future, including where they see growth opportunities.

More speakers will be announced in the coming weeks.

Who's in the room?

The sessions account for only half of the Forum's value. The other half comes from who you meet and having the time to talk to them properly.

The 300 attendees at the GlobalPETS Forum are CEOs, managing directors and commercial leaders from 32 countries. They run pet retail companies, distributors, manufacturers and brands, from family businesses to private equity-backed groups. While most come from across Europe, some fly in from the Middle East, Asia and the Americas. Many of them are hard to get a meeting with. At the Forum, you might bump into them in line for the buffet.

We plan the days around those conversations. Breaks and lunches are deliberately long. Unlike at a trade show, nobody is rushing off to their next appointment, so discussions tend to go further.

The evenings matter just as much. The Forum opens with a walking dinner at the hotel on Monday. On Tuesday, we have dinner at Estufa Fria, a garden of lakes and waterfalls in a former basalt quarry. For many attendees, it's the highlight of the three days.



You go home with a clearer view of the year ahead and ideas to test in your own business. You also know who to call when you need a second opinion.

Why they come back

Regulars tell us they keep coming back for the same reasons. They meet senior executives they rarely see otherwise. They hear ideas from outside their own business. They also go home with energy that lasts well beyond the trip.

- **Fressnapf** founder **Torsten Toeller** calls the Forum "the best place for qualified discussions with the absolute leaders in our pet world".
- **Dušan Plaček**, CEO of **Plaček Group**, says "there is always something new for me" and he is "very happy to come back every year".
- **Nikola Ninov**, Managing Director of **Petmall**, went home "really influenced and inspired to lead my company in the right direction".
- **Simona Medricka** of **Lyopet** attended her first GlobalPETS Forum in Istanbul in January 2026. She says: "I was pleasantly surprised by the high caliber of the attendees and the quality of the connections I made".

If you haven't been to GlobalPETS Forum before, give it a try in 2027. Just don't be surprised if your January 2028 becomes spoken for too. ◆

More info & tickets

Full program, speaker lineup and registration:

globalpetindustry.com/gpf

GlobalPETS Forum Award 2027

Who will follow in the footsteps of 2026 winner Non-stop dogwear and take home the next GlobalPETS Forum Award?



Every year, the GlobalPETS Forum Award puts one pet brand in the spotlight. Past winners include Josera, Tractive, Zolux and Earth Rated. They are very different brands. But at the time each won, they all had something in common: large enough to have proven themselves, yet still the ones to watch.

That is who this award is for. Not the biggest brand in the industry. Not always the fastest growing. A brand that is doing notably well. With great products, loyal customers and business that extends well beyond the domestic market.

This year, 197 companies submitted their entries. After reading every application, we picked five nominees. We looked at how they are growing, at home and abroad. At the quality of their products and how much customers love them. At their marketing, their innovativeness and their impact on the wider industry.

The winner will receive the award on stage at the GlobalPETS Forum 2027 and will share their story with a room full of around 300 senior executives. Here are this year's five nominees:

FuzzYard

Founded in Melbourne in 2003, FuzzYard is as much a fashion brand as a pet brand. Nowadays, its toys, walking gear, beds and homeware products are sold in over 15,000 stores in more than 50 countries. The company motto: "We don't do boring".

Symply Group

The Symply Group brings together five UK pet food brands: Canagan, Symply, Yora, Tribal and McAdams. Family-run since 1992, it has backed specialist pet shops for over 30 years. Its founder-led brands put quality first and never compromise on nutrition.

Benebone

Family-owned US company Benebone makes durable, real-flavored dog chew toys. It all started with the Wishbone, a curved bacon chew dogs can hold in their paws. Benebone's chews, toys and treat puzzles are sold on four continents.

Wanpy

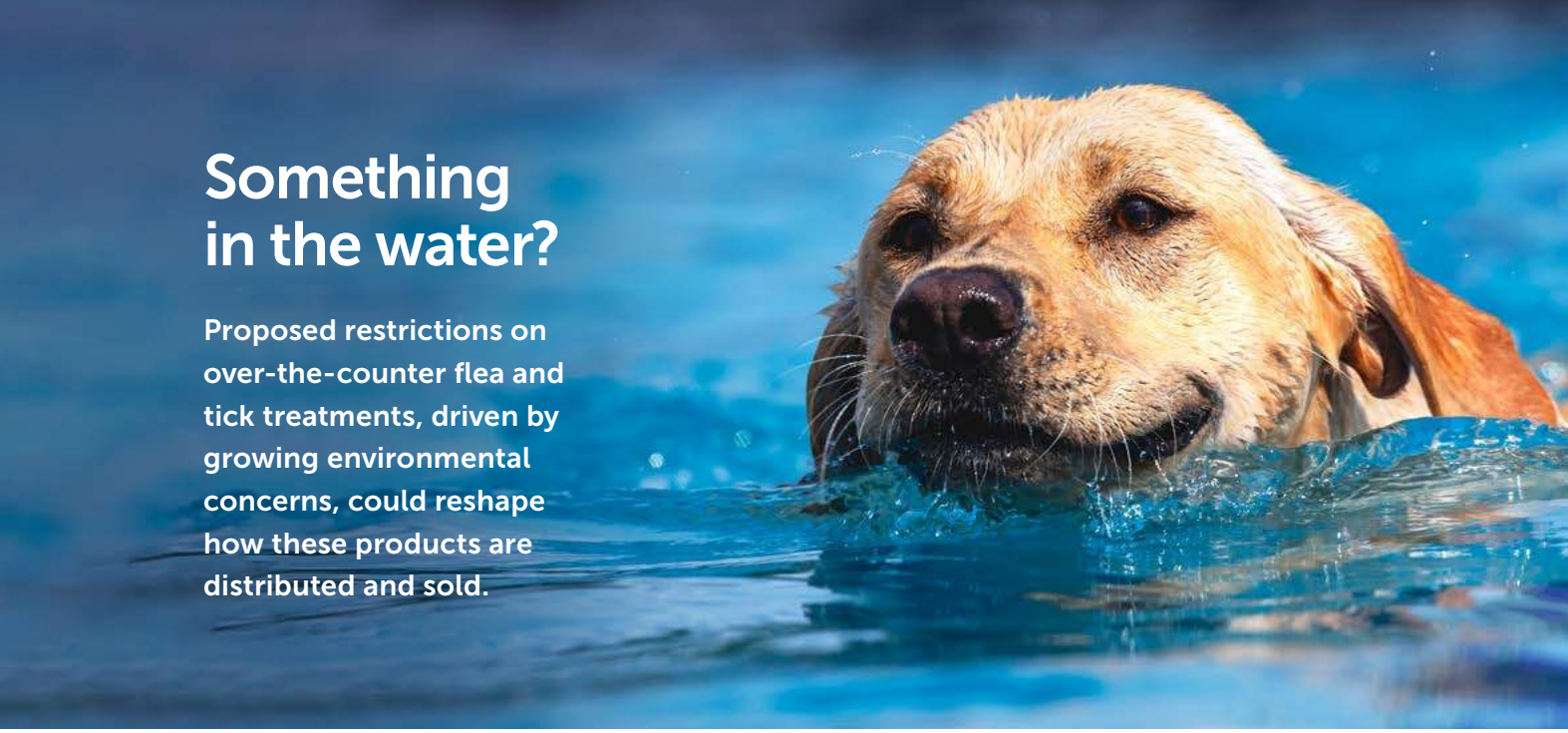
Wanpy was founded in 1998 and has spent nearly three decades making safe, high-quality pet food. Its products now reach pets in 77 countries. The brand's mission is to treat pets as family members, providing them with healthy, nutritious and palatable food.

FORZA10

FORZA10 is an Italian premium pet food brand born from veterinary research. Dr. Sergio Canello launched the business in 1996, and science still drives its dog and cat nutrition today. Although part of the French Bab'in Group since 2021, production remains based in Italy.

Want to know who will win? Join us in Lisbon in January to find out! ◆

Something in the water?



Proposed restrictions on over-the-counter flea and tick treatments, driven by growing environmental concerns, could reshape how these products are distributed and sold.



Diana Dominguez
Business Reporter
GlobalPETS

Stricter oversight of antiparasitic medications for pets across Europe and beyond could have wide implications for the market, affecting retailers and increasing costs for owners. As authorities consider measures to reduce water pollution, industry stakeholders question the effects of tighter controls.

UK leads call for evidence

In April, the Veterinary Medicines Directorate (VMD), an executive agency of the UK Department for Environment, Food & Rural Affairs, launched a call for evidence on the use of flea and tick treatments after research found that chemicals from these products are contaminating local waterways.

VMD-funded research had identified two commonly used ectoparasiticides – fipronil and imidacloprid. Residues can enter the environment through wastewater, as well as when treated pets enter natural bodies of water. The VMD proposes that these products should only be available through veterinarians, pharmacists or suitably qualified persons (SQPs), which would restrict access to over-the-counter (OTC) treatments.

The eight-week call for evidence sought information on environmental contamination and views on how potential changes to supply routes could affect animal welfare, pet owners, businesses and access to these medicines. Analysis of the 1,131 submissions has been ongoing since June, and publication of the summary of responses was expected in October. However, by early November, this was still not available.

Environmental Committee report

On 5 August, the UK parliamentary Environment and Climate Change Committee published a report in which it raises concerns about the VMD's focus on fipronil and imidacloprid. Sales of products containing these chemicals have declined, while much less is known about the environmental impact of chemicals in newer treatments, particularly isoxazolines.

The Committee report outlines eight recommendations for the UK government. Besides a call for transparent collation and publication of pet sector data on the scale of pet parasite medication (PPM) sales and usage, it also recommends that the extent of pollution be established, environmental risk assessments introduced and governance arrangements reviewed.

Other recommendations include funding research – with a contribution from the pet care industry – on parasite prevalence and the impact of PPMs on human health and the environment, restricting PPM access to advice-based supply channels, improving training and advice to support risk-based use, and strengthening product labeling and bathing restrictions after PPM use.

Governmental response

The UK government responded to the Committee's report on 8 October, recognizing the balance to be struck between environmental protection, animal welfare, human health and continued access to safe and effective veterinary medicines. It emphasized that decisions must be guided by robust scientific evidence and a careful assessment of both benefits and risks.

The government agreed to the recommendations on data, monitoring, risk assessment and governance. It also agreed to the need for expert training, so that pet owners are educated on PPM use. But there was no full agreement on government funding for impact research, and PPM access will not immediately be restricted. The UK government also disagreed with the recommendation to extend bathing and swimming restrictions from four to 28 days.

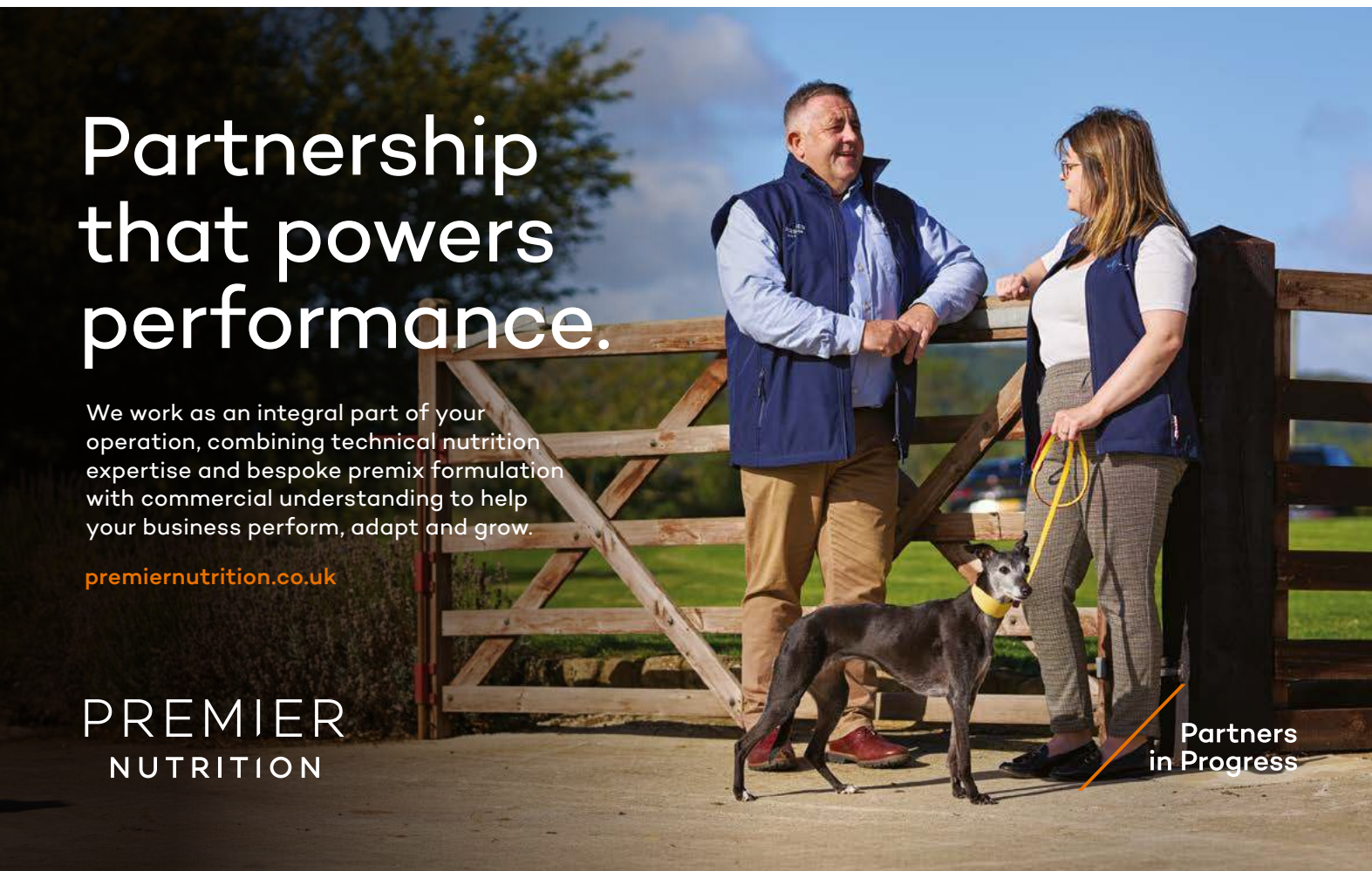
Wider European concerns

Monitoring data from the Scottish Environment Protection Agency (SEPA) in 2024 provides further evidence of the presence of fipronil and imidacloprid in waterways. Meanwhile, the Swiss Federal Institute of Aquatic Science and Technology (Eawag) reported in January that fipronil had been detected in waterways at concentrations considered critical for aquatic life, with flea and tick treatments identified as the most likely source of contamination.

While Swiss authorities haven't established the specific activities through which fipronil enters wastewater, Eawag says the substance is clearly entering water bodies through both domestic wastewater and sewage treatment plants. "In conventional sewage treatment works, fipronil is hardly eliminated so enters watercourses along with the treated wastewater," Eawag tells PETS International.

In May 2025, a study in Italy detected fipronil and imidacloprid in animal shelter wastewater. The substances were found to harm aquatic organisms, including copepods and mussels, and cause toxic effects on human skin cells. This issue has also been highlighted by the Italian Institute for Environmental Protection and Research (ISPRA), which considers it a significant ecotoxicological concern.

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Industry voices insist that measures to improve environmental outcomes shouldn't make effective parasite control more difficult or expensive for pet owners.

Compromising pet wellbeing?

In April, the National Office of Animal Health (NOAH), the UK trade association for the animal health industry, responded to the announcement of a government review by saying that limiting access to OTC products could compromise parasite control.

NOAH emphasized the ongoing cost-of-living pressures facing pet owners, indicating that affordability is a critical factor in ensuring pets receive the care they need. It argues that removing or restricting the OTC route could limit access to essential parasite control, narrowing one of the remaining options for some owners to protect their pet's health.

In addition, NOAH points out that the declining trends in imidacloprid concentrations in UK surface waters – with sources not limited to veterinary medicines – have occurred without changes to the current distribution and classification of pet parasiticides. This suggests that progress can be achieved without regulatory intervention.

The industry perspective

The UK's Pet Industry Federation (PIF) has voiced support for the VMD's recommendation to limit access to OTC flea and tick treatments. In August, it suggested measures to reduce environmental contamination, including longer bathing restrictions following spot-on treatments.

PIF contends that restricting access alone wouldn't address the way products are used, and measures to improve environmental outcomes shouldn't make effective parasite control more difficult or expensive for pet owners. PIF also notes that fipronil and imidacloprid are not only used in flea treatments – other potential sources in waterways haven't yet been fully investigated or quantified.

The federation says that pet groomers, boarding establishments and specialist pet retailers could play a greater role in informing owners on responsible use. PDSA – the British vet charity for animals in need – says in its 2026 annual wellbeing report that 81% of dogs, 82% of cats and 22% of rabbits are currently treated preventively for fleas in the UK.

Impact on wildlife and human health

Research has also raised concerns about the effects of pet parasite treatments on wildlife, ecosystems and human health. According to Elanco Animal Health, a US-based pharmaceutical company, the market share of traditional spot-on applications for pet flea control containing imidacloprid is gradually declining in most countries, as vets and consumers shift toward chewable products. But these alternatives can also introduce chemicals into the environment.

A study published in January by researchers from VetAgro Sup, the Veterinary Campus at the University of Lyon in France, found that isoxazolines – veterinary antiparasitic drugs commonly used in chewable tablets – can persist in pet feces and may pose a risk to dung-feeding insects, soil and water. As insects play an important role in nutrient cycling, soil health and pest control, exposure to these compounds could have wider ecological implications.

The UK's University of Sussex published research in April that provides some of the first evidence of fipronil and imidacloprid reaching wild birds through contaminated nesting material made from pet fur. This has prompted environmental and veterinary organizations to call on the government to set a clear timeline for reviewing these product sales, making the treatments prescription-only and fully assessing their environmental impact.

In the US, the city government of San Jose, California, also notes that fipronil and imidacloprid can harm wildlife. The California Department of Pesticide Regulation is reviewing their use in relation to potential human health risks from prolonged household exposure. In the meantime, it encourages owners to use alternative flea and tick treatments.

Revised EU directive

According to ISPRA, traditional wastewater treatment plants are ineffective at retaining emerging

micropollutants. The issue is being addressed at EU level, with the 2024 EU Urban Wastewater Treatment Directive requiring the removal of micropollutants from urban wastewater.

This revised directive has introduced the extended producer responsibility principle. Manufacturers of pharmaceuticals and cosmetics – the main origin of micropollutants in urban wastewater – are now required to contribute to a minimum of 80% of the cost of advanced wastewater treatment.

Further studies in the pipeline

In February 2025, the European Medicines Agency (EMA) published a paper on a methodology for the environmental risk assessment of ectoparasiticidal veterinary medicinal products (VMPs) for cats and dogs. The methodology was to be used to develop a new scientific guideline. Following a review of feedback received last year, the EMA decided in February 2026 to proceed with guideline development. Work on this is ongoing, with no final recommendations yet published.

In addition, the EMA is sponsoring an academic study examining levels of ectoparasiticidal substances in the environment across several EU countries. This will determine whether residues can be attributed to the use of VMPs in companion animals.

Potential effects on consumers

A survey of 2,001 UK cat and dog owners conducted by Censuswide on behalf of Johnson's Veterinary Products in May found that the proposed restrictions could place a greater burden on lower-income households. Only 19.7% of respondents earning less than £15,000 ($20,250/€17,250) annually are positive about veterinary consultation or specialist involvement before purchasing flea and tick treatments.

Fewer than a third (31.3%) purchase these products at a vet's practice, while 29.9% buy treatments from pet shops and superstores. Among the lowest income group, 59% say they would continue treating their pets if reclassification occurred, compared with 71% of those earning over £75,000 ($101,250/€86,250).

Pet groomers, boarding establishments and specialist pet retailers could play a greater role in informing owners on responsible use.

Nearly one in four respondents say reclassification would mean they treat their pets less frequently or stop treating them altogether. Among lower-income owners, 11.4% say they would seek alternative products through other channels, potentially including unregulated sources – compared with 5.3% of higher earners.

Retailers fight back

The British Independent Retailers Association (Bira) warns that restricting OTC pet parasite treatments could damage high street businesses and increase costs for pet owners. "Independent pet shops provide knowledgeable, affordable, accessible service to pet owners," says Andrew Goodacre, CEO of Bira. "Removing flea treatments from their shelves, through a regulatory process that's involved no retail impact assessment, and no meaningful consultation with our sector, is simply wrong."

Bira warns that the cost of staff obtaining and retaining the SQP status required to sell these products under the proposed reclassification could be prohibitive for many small businesses. The body is calling for a full retail impact assessment, formal consultation with trade organizations representing affected retailers, and recognition of the role independent pet shops play in providing responsible advice to their communities.

Taking the long view

Bill Carter, Executive Vice President and General Counsel at PetIQ, a US pet health and wellness company, says a potential OTC ban could affect businesses with limited sales through veterinary channels and may force them to reshape their business models if introduced.

As significant progress is being made in identifying the environmental impacts of pet parasite treatments, authorities are seeking ways to balance the requirement for tighter regulation with the need for consumer access to parasite control. At the same time, trade organizations are asking regulators to keep in mind the potential effects on businesses supplying these products. ◆



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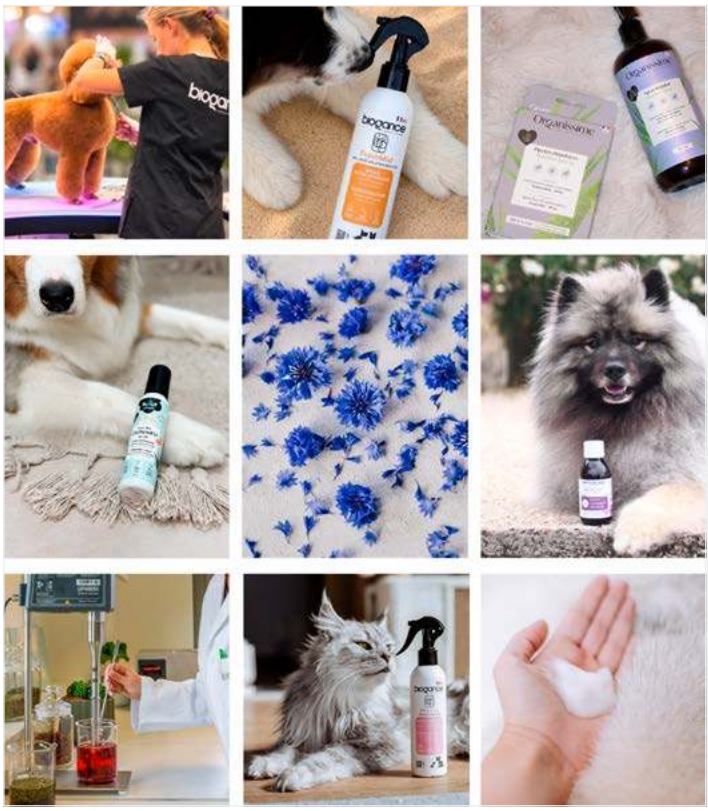
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Brushing up on grooming data

An exclusive survey of pet parents across seven countries on this aspect of care shows that while frequency is increasing, most still prefer the DIY approach.





Thaís Matos
Senior Business Reporter
GlobalPETS

Grooming is becoming a more regular part of owners' routines, although habits vary significantly by country and type of companion animal. Professional services are more popular among dog parents, while spending expectations suggest that the majority of consumers will not reduce their budgets in 2027.

A significant proportion

Around two-thirds (67%) of owners groom their animals, either at home or through professional services, according to a survey by Yummypets, powered by Loop, and PETS International of 2,457 pet parents in Australia, Brazil, Canada, France, Mexico, the UK and the US.

Grooming is more prevalent among the respondents in English-speaking countries, particularly in Australia (75%), the UK (73%) and Canada (73%). The US and Brazil are in line with the average, at 68% and 63% respectively, while Mexico (58%) and France (59%) report the lowest shares. But the most significant difference is between the type of pet: 83% of dog parents groom, compared to just half of cat parents (50%).

Rising frequency

Grooming is a regular activity across all markets, with six in 10 owners tidying up their pets at least once a month. This marks a 16 percentage point increase since a Yummypets and PETS International survey of 2023, which covered 525 pet owners in Belgium, Canada, France, the UK and the US.

Grooming frequency is more or less in line with the general rates per country. Pet owners in the UK and the US clearly lead at twice a month or more: 49% and 41% respectively.

Three in 10 respondents groom their dogs or cats every two to three months. This type of frequency is seen more among Mexican (40%) and French owners (34%). Only 8% of pet parents opt for very sporadic grooming – once or twice a year – although more so in Mexico (12%) and France (16%).

The twist comes with the comparison between cats and dogs. Although fewer cat parents use grooming services or groom themselves, those who do appear to do it more frequently than dog owners: 72% of cat-owning respondents groom every month versus 56% of dog owners.

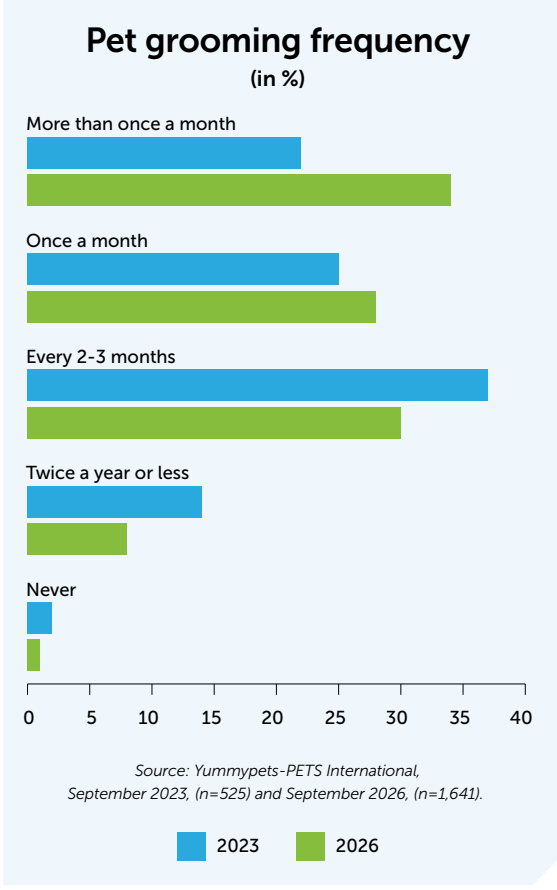
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Professionals vs owners

Overall, most pet owners groom their pets at home, with 74% handling the task themselves. However, the results vary considerably across markets. Home grooming is more common in Europe, Australia and North America, with over 84% of pet parents choosing this option in the US and 83% in France.

In Latin American countries, home grooming is slightly less popular – at 50-65%. Brazilian and Mexican owners prefer to take their pets to local groomers. The preference for this option is 51% in Brazil and 43% in Mexico, while the global average is only 30%.

Mexico also records the highest shares for mobile groomers (17%) and pet stores (19%), against averages of 7% and 10% respectively. These results point to different market dynamics, with a larger presence of independent, local professional groomers in Latin America.



Source: Yummypets-PETS International, September 2023, (n=525) and September 2026, (n=1,641).

Professional grooming as a whole is a dog-dominated field. Cat owners are more likely to groom their pets themselves (85%) than dog owners (67%). And, while 40% of dog parents use local groomers, only 12% of cat parents do the same. Pet stores also attract a higher proportion of dog (13%) than cat owners (6%), a pattern that is repeated, albeit with a smaller gap, for mobile services (7% vs 5%).

The global perspective

The World Alliance of Grooming Associations (WAGA) reports that the US has the highest number of professional groomers (49,347), followed by the UK (15,037), Brazil (12,689) and Canada (3,825). North America accounts for 40% of global revenue in the sector, according to WAGA, with labor shortages driving up prices and mobile services commanding higher premiums than salon-based alternatives.

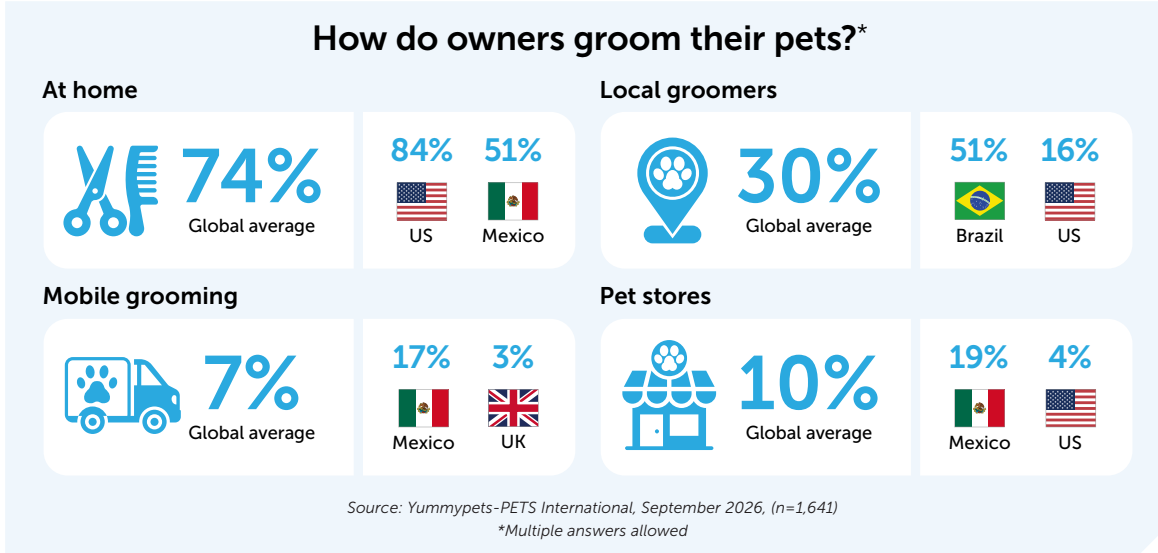
The Yummypets and PETS International survey found that only 4% of US owners and 6% of Canadian owners use mobile services, suggesting the potential for further adoption in the region. The data also points to a link between frequency and location, with markets where owners groom their pets more often also reporting higher rates of at-home grooming.

What drives service choice?

Groomer friendliness and expertise (21%), price and affordability (20%), and cleanliness and hygiene of the facility (17%) are the top three reasons considered by owners when choosing a service – something that hasn't changed since the survey of three years ago.

But respondents also value reputation and reviews, plus the services offered (e.g. bathing, haircuts and nail trimming) – both at 16% – as well as location and convenience (14%). The availability of appointments seems less important, with only 5% of the pet owners taking this into account.

As the respondents in Mexico and Brazil are more likely to use professional services, they also give higher than average responses for almost all the reasons presented to them. But while expertise is the most important feature for Mexican owners, reputation and hygiene are factors considered more often by Brazilian pet parents.



Source: Yummypets-PETS International, September 2026, (n=1,641)
**Multiple answers allowed*

Qualifications build consumer trust

Certifications are also important to consumers choosing professional services. More than half (58%) consider groomer qualifications important or very important. This suggests that recognized credentials can help providers build trust and differentiate their services. Across Europe, professional grooming training and certification schemes offer opportunities to strengthen skills and demonstrate expertise, although pathways and recognition vary from country to country.

In Germany, the Potsdam Chamber of Industry and Commerce and the German Pet Trade and Industry Association, ZZF, have jointly developed a one-year professional dog grooming qualification. Launched in 2025, the program combines practical skills with training in canine health, animal welfare and business management. The second intake began in October 2026.

Budgets vary by market

Whether at home or in salons, monthly grooming expenses remain below $50 (€45) for eight in 10 pet owners. Expenditure is generally concentrated in the lower price brackets, with more than half of the respondents (52%) spending less than $20 (€18) per month.

The UK stands out in the responses on spending, with 63% of owners in the lower category. On the other side of the world, Mexico has more owners dedicating a larger part of their budget to grooming: 46% of the Mexican respondents spend between $20 (€18) and $49 (€44) per month. Brazil also has a high share of owners in this category, at 38%.

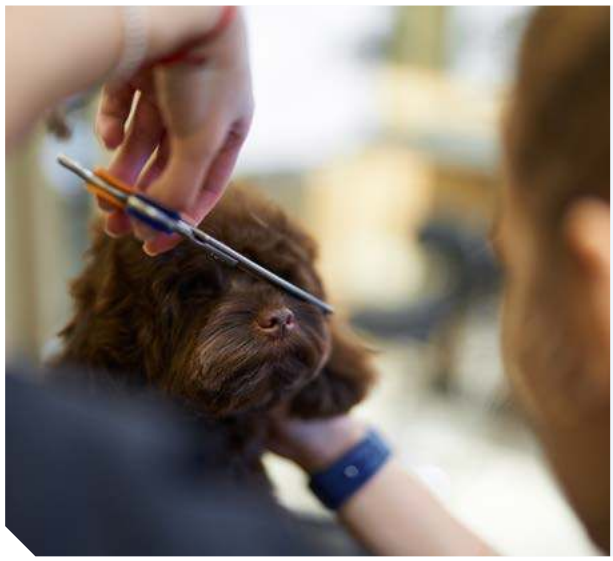
Some 68% of cat owners spend less than $20 (€18) per month, compared to 43% of dog owners. Among the higher-spending dog parents, 33% report $20 (€18) to $49 (€44), while 19% spend over $50 (€45). These country and cat-dog spending differences are, understandably, consistent with the type of grooming used. Owners who opt for external services are also those who say they spend more.

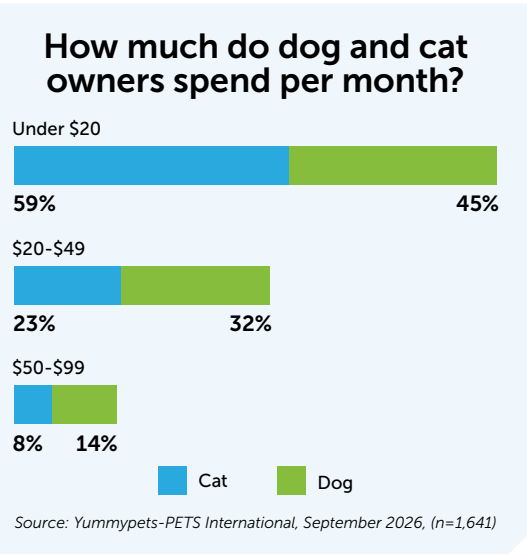
Impact of inflation

Survey respondents are equally divided on whether inflation has affected their consumption of professional services. There are, however, slightly more owners saying that inflation hasn't reduced their use of groomers (51%) than those who say it has (49%).

Rising prices are perceived differently across the regions. More than half of the consumers in France and the UK say they haven't changed their habits due to price increases. These rises have, however, led to owners using grooming services less often in Mexico (45%), the US (44%), Australia (42%), Brazil (42%) and Canada (42%).

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In 2023, when Yummypets asked owners whether inflation made them reduce how often they used grooming services, the category was less affected: 59% of respondents said no and 41% said yes. French respondents at that time were also the least affected by inflation, with only 29% of owners reducing frequency, while half of the respondents in Canada and the US reported reduced use of services.

In August 2026, prices for pet services – including veterinary care – had risen by 8.4% in Brazil in the past year. This price rise was 4.8% in both the US and the UK, and 2% in France, highlighting differences in pet care inflation across the markets.

Although most countries don't publish inflation indices specifically for grooming, broader service categories can provide an indication of price trends. In the UK, the Office for National Statistics (ONS) added pet grooming to its official inflation calculation in March 2026, so that price changes in the category now contribute to the overall index.

Consumer expectations

Respondents to the latest survey are more concerned with price rises in other categories than they are about grooming service increases. Only 16% of all pet owners – many of whom groom themselves rather than paying for a professional service – expect to spend more next year.

This is far behind their expectations of spending more on food (73%) or health (54%), and below supplies (33%) and even toys (20%). A larger budget for grooming is expected to be necessary in Mexico (21%) and Brazil (19%), already the leaders in cat and dog owner spending on professional services.

However, not anticipating paying more for grooming does not necessarily mean reducing expenditure, as only 21% overall expect to spend less on this category next year. Interestingly, this expectation was reported more by Mexicans (30%), with Brazilians (22%) and Americans (22%) also slightly above the global average.

Outlook for 2027 and beyond

Owners in France (76%) and the UK (69%) expect to maintain the same level of grooming expenditure in 2027, followed by Canadians (67%). Findings show that it is pet owners in countries where the effects of inflation have been felt least who expect to continue with their current habits.

The data indicates little movement overall in the grooming service market. There are no significant figures suggesting cutbacks, but there's also no intention to increase spending, whether with premium services or higher visit frequency. Despite this short-term potential setback, projections for the category are positive. WAGA expects the market to grow from $17.9 billion (€16.1B) in 2025 to $42.9 billion (€38.5B) over the next 10 years. ◆



Regional report: Nordics

A future built around functional food and innovation

Although manufacturers in the region face pressure across price segments, single-serve formats, frozen foods and products offering health benefits are creating growth opportunities in 'smart premiumization'.



Jessica Suni
Contributor
PETS International

In Sweden, Finland, Norway and Denmark, pet food makers and retailers are navigating diverging consumer demands. While some shoppers prioritize affordability, others are willing to pay more for products promising specific functional benefits. Pet players are responding with new formats, nutritional innovations and investments in production capacity – although market trends vary across categories and countries.

Consumer polarization

Nordic pet food manufacturers are having to adapt as consumers become more selective. Patrik Niklasson, General Manager of Swedish-based Partner in Pet Food (PPF) Nordics, and Magnus Pettersson, CEO of Finnish-based Snellman Petfood, both see signs of a growing gap between two extremes. According to them, some buyers seek lower prices and promotions, while others are willing to pay for perceived added value.

"The market has shifted away from the mainstream and become more polarized, with demand moving toward both premium products and more affordable alternatives. The middle segment is facing greater pressure," Niklasson says.

Responding to price squeezes

In response to price pressure, PPF launched a limited-edition larger pack of its Doggy Professional Gentle dry dog food at the end of May. The promotional campaign was created around an extra 1.5kg (equivalent to 12.5% more food) in the bag and timed to highlight the fact that the Swedish government's decision to temporarily halve the VAT on food from 12% to 6% as of April this year omitted pet food from the reduction.

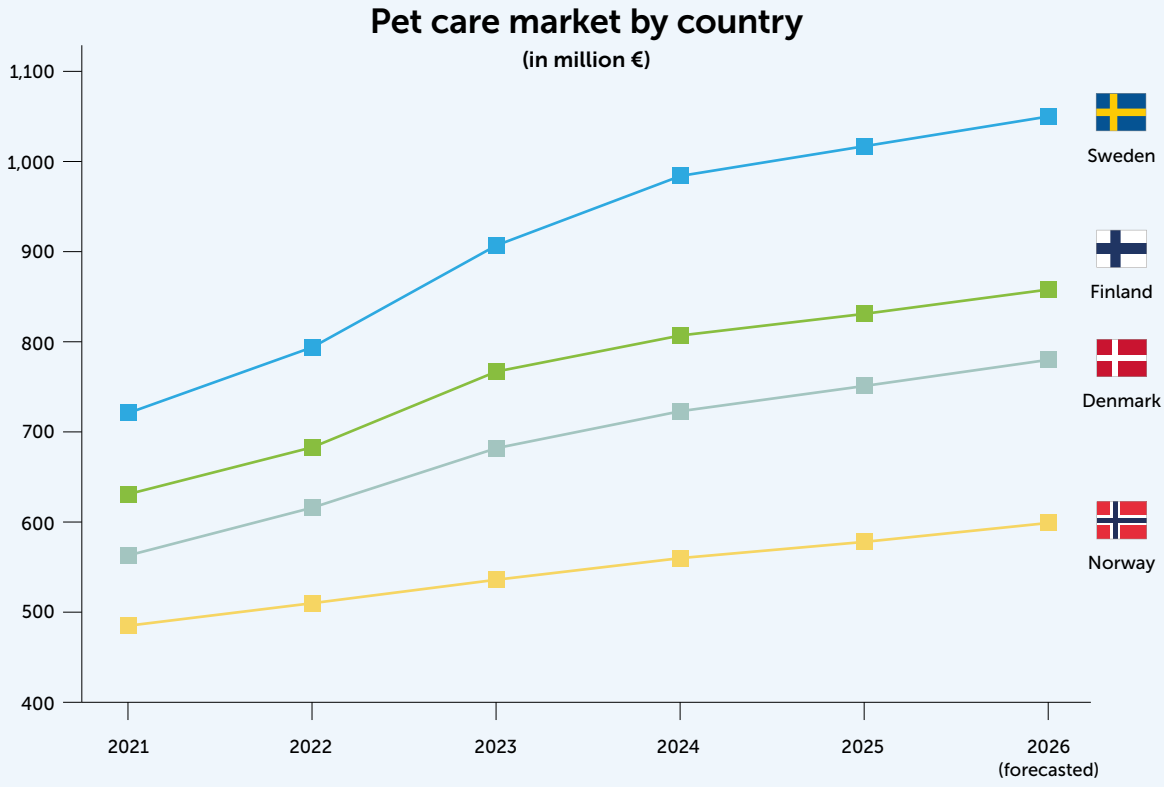
As a result, animal food would continue to be taxed at 25%, even though the cost of having pets has risen sharply. Veterinary care and insurance have become more expensive and pet food prices have increased, just as human ones have.

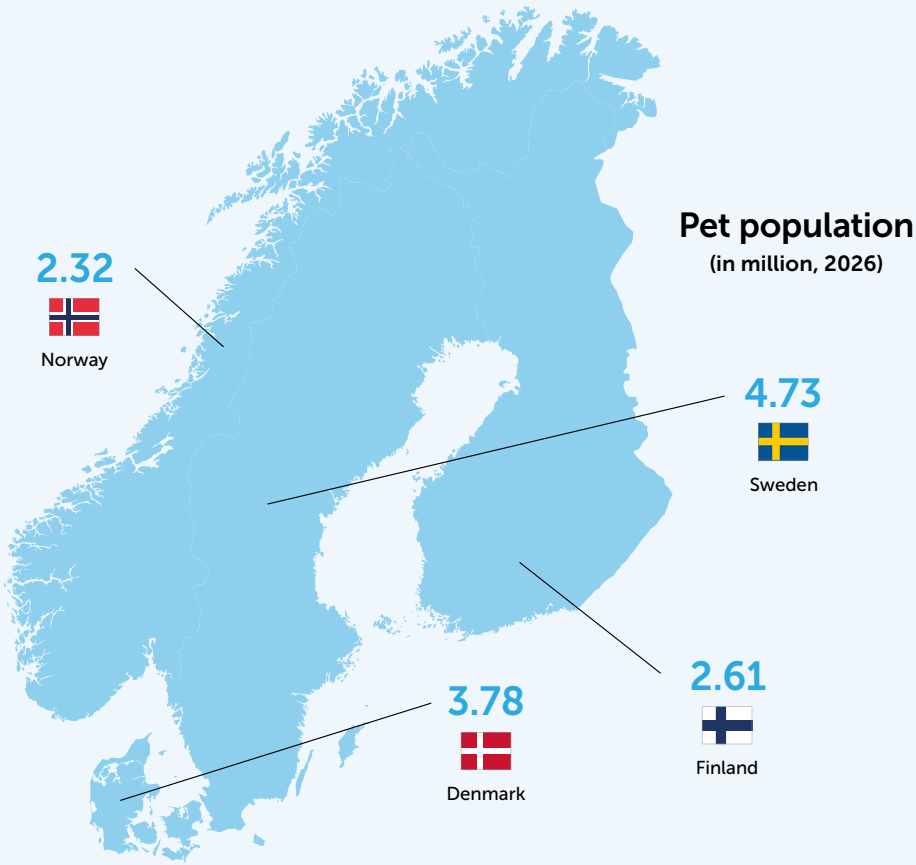
"For many, the dog is a natural part of the family. Then it becomes extra important for us to find solutions that actually make a difference in everyday life, and that is exactly what we want with this investment," explains Lisa Müller, Head of Marketing Retail at PPF.

In Swedish grocery retail, pet food sales have declined by approximately 2.6% in volume but increased by 0.9% in value. The difference largely reflects pricing and changes in the product mix rather than higher sales volumes, Niklasson believes.

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The Nordics in numbers





Source: Euromonitor International

Nordic production is associated with clean raw materials, low antibiotic use and food safety, so having origins in the region can reinforce a perception of quality.

A varied picture

The picture is not uniform, however. At Swedish retailer ZOO.se, the middle segment is currently showing the strongest growth, particularly in dog food. Nina Lindström, Category Manager and Product Developer at Pet Pawr Group, which operates ZOO.se, provides insight into these changing purchasing patterns. "Premium is stable and performing somewhat better in cat food, while the most price-oriented products are losing share in both categories," Lindström informs PETS International.

Separately, in October, Pet Pawr Group announced it will focus on providing its best-performing products and service offerings for dog and cat owners in its main markets of Sweden and Norway. As a result, ZOO.se and PetXL are gradually discontinuing the sale of live small animals and fish in the group's 32 physical stores from now until mid-2027.

"Dog and cat owners are our largest customer groups, and we see a clear opportunity to create an even stronger and more relevant offering for them. Through this change, we can focus our investments and resources on a better product range, more inspiration and an even better customer experience in our stores," says Martin Daniels, CEO of Pet Pawr Group.

Smart premiumization

Both PPF and Snellman emphasize that higher prices increasingly need to be justified by tangible benefits. Niklasson describes the development as "smart premiumization". Pet owners want to understand what added value they receive in return for increased outlay – whether in terms of nutrition, functionality or convenience. "It is no longer simply a case of assuming that an expensive product is a good product. You have to demonstrate why it is better and why consumers should pay more," he says.

Examples of added value mentioned by both manufacturers include products targeting digestion, weight management and general wellbeing. For instance, PPF relaunched its Bozita Robur dog food range with postbiotics as part of the recipe. The company says the range is growing by more than 10% year on year across the Nordics, which Niklasson sees as evidence that functional value can support premiumization. Additionally, functional treats are becoming more common.

Single-serve formats are another area of growth identified by Niklasson, particularly pouches and small cans that combine convenience with a premium feel. PPF reports high double-digit growth in cat food pouches in Swedish grocery retail over the past six months. Its 85g single-serve line, launched 18 months ago, has reached approximately 10% market share in the 85g can segment. The company has adjusted its range and production priorities accordingly.

Investments in production capacity

At Snellman Petfood, overall company sales have risen by 17% so far this year, with full-year revenue expected to reach approximately €35 million ($39M), according to Pettersson. In particular, its frozen raw food sales volume is up by about 10% year to date compared with the same period in 2025.

The company is backing this demand with a €18 million ($20M) investment in a new factory for its MUSH brand of raw food in Pedersöre, Finland. The facility is designed to raise weekly frozen raw food capacity from around 180 to 300 tonnes – an increase of roughly 70% – while supporting automation and new product categories, including air-dried and oven-dried food.

Moreover, in March this year, Snellman Group's parent company received a seven-year €30 million ($33M) loan from Nordic Investment Bank (NIB). The loan will be used to support the increased capacity, automation and energy efficiency of the firm's operations and improve its capabilities for growth. The deal will include co-financing investments in a planned dispatch logistics center at the group's production facility in Pietarsaari, western Finland.

Pettersson identifies Finland, Sweden and Norway as substantial contributors to recent raw food growth. Beyond the Nordics, the Baltic markets and parts of Central Europe are developing strongly, while Germany remains strategically important.

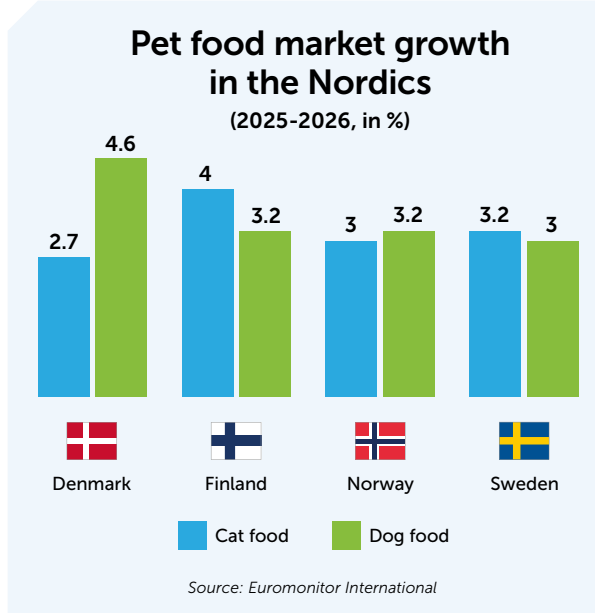
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From ownership to partnership

Another factor influencing product development is the ever-changing relationship between people and pets.

Humanization has long been one of the dominant concepts in pet care, but Pettersson believes the relationship is evolving still further. Snellman Petfood participated in a qualitative study by Finnish strategy consultancy Noren involving around 20 dog and cat owners in Finland and Sweden. The findings, Pettersson says, suggest a move from ownership toward partnership and "mutual wellbeing".

The distinction is significant. "Instead of humanizing their dogs and cats, owners realize that this is an important family member, but one with its own needs," he says. This is driving interest in species-specific needs including nutrition, exercise and social interaction.



Source: Euromonitor International

Making a feature of Nordic values

The CEO believes this way of thinking supports demand for less-processed food. Noren's findings also highlight consumers' expectations of research-based guidance and products suited to individual pet needs. The study has informed the positioning of Snellman's MUSH brand, with the aim of reaching consumers beyond the traditional raw-feeding audience.

According to Pettersson, Nordic production is associated with clean raw materials, low antibiotic use and food safety. Therefore, having Nordic origins can reinforce the perception of quality.

Niklasson agrees, mentioning enquiries from Nordic retail customers who see Swedish production as part of the positioning of both branded and private label products, as well as a basis for distribution across several countries.

Stores retain an important role

Pet food sales are becoming increasingly fragmented between grocery retail, specialist pet stores and online channels, observes Niklasson. This is forcing manufacturers to develop strategies for several routes to market.

At ZOO.se, physical stores have gained share, partly reflecting internal decisions. "Around 2023-2024, the split between stores and online was roughly even for dog and cat food. Today, stores account for a clear majority of our pet food sales," Lindström says.

When it comes to frozen food, Pettersson notes that the boundary between physical and online retail is blurring as new delivery and ordering models develop. However, home delivery remains more complicated for frozen than for shelf-stable products.

Claims come under scrutiny

As functionality becomes a stronger selling point, consumers are presented with a growing number of product claims. According to Pettersson, it can be difficult to determine whether functional ingredients are present in meaningful amounts or primarily there to serve a marketing purpose.

"It is always a jungle for the consumer to understand whether blueberries have been added for antioxidants and polyphenols, or just so the word 'blueberries' can be put on the bag," he says.

For manufacturers, the challenge is not simply to introduce new ingredients but to substantiate their benefits and communicate them clearly. As competition intensifies, differentiation increasingly depends on evidence as well as innovation. "Simply being good is no longer enough. You have to be relevant and clearly different," Niklasson concludes. ◆



Kadri Ulla, Group CEO, PetCity

"We've changed up to 60% of our assortment since the Musti acquisition"



The retailer is enhancing omnichannel operations while targeting a doubling of its store network in Lithuania by 2029.



David Palacios Rubio
Editor-in-Chief
GlobalPETS

PetCity is restructuring following its acquisition by the Finnish Musti Group in November 2024, with changes in product assortment, pricing, systems and services. Integration has already brought a substantial overhaul of the retailer's range. PetCity currently offers around 3,600 SKUs, with a further 400 to be added by the end of this year.

Kadri Ulla joined PetCity in June 2025. She knew the retailer from her previous role at the Estonian company that owned it before the acquisition. She's overseeing the ongoing integration, while navigating the competitive Baltic pet care market, where strong brand loyalty and price sensitivity shape consumer behavior.

PetCity is developing its e-commerce offering, expanding services and leveraging Musti Group's expertise to strengthen its omnichannel model. Ulla discusses with PETS International how the integration is reshaping the business and where she sees the greatest opportunities for growth.

First of all, how's the integration going?

There are still quite a few things to implement. We don't yet have the full Musti assortment or all the available IT tools and services. Customers can expect several

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new developments over the next year or two. These are significant investments, and integrating everything takes time. It mainly involves IT integration, changing platforms and replacing point-of-sale systems.

What have been the greatest challenges so far?

The biggest challenge for our customers has been getting used to the new food brands. I myself have cats, dogs, horses and chickens, so I know that changing, for example, a dog's food isn't always easy. The same goes for cat litter. Customers in our region tend to associate higher prices with better quality. They're very brand oriented and quite loyal, so it takes time to introduce new products and change habits.

The integration until now has also involved time- and resource-intensive changes to HR programs and working-time principles.

How different is the assortment now?

We've introduced most of Musti's range of food, accessories, toys and care products, along with many new brands for our market. In some categories, up to 60% of the assortment has changed, while in others less so. Treats and toys have seen significant changes, which customers have welcomed. Although it takes longer for consumers to get used to new food brands, the response to toys and treats has been very positive.

In what ways are you helping customers adapt to the new brands?

By training our employees and providing trial-size bags. We also use point-of-sale materials to explain the products, as well as newsletters and other communications. In addition, we're running a number of campaigns for our own and exclusive brands.

Has pricing changed at all?

Pricing has been challenging, particularly because Musti Group has had to understand local price levels and the extremely demanding environment. One of my Musti colleagues described PetCity as operating in a "competition jungle" compared with the Nordics.

Setting competitive prices remains a challenge when decisions are made from a distance. We have lowered prices for some brands, and Musti is using more tools to make price analysis faster and more effective. Understanding the local competitors is essential.

How do Baltic customers' preferences differ from those in Nordic countries?

Baltic customers place their trust in established international brands. Introducing new – or less familiar – global brands can therefore be difficult, but those we launched more than a year ago have become popular, and some are already among our best-selling products.

Another difference is that mixed-breed companion animals are more common in our region, as many people adopt from shelters. But all pets need high-quality food.

There's also a much wider choice of places to shop here. Some DIY stores have larger assortments than our biggest store – not generally the case in the Nordics. There are also specialist retailers for accessories or particular brands, and supermarkets sell well-known, good-quality brands too.

Tell us something about your store network...

We have 49 stores in all – 22 in Estonia, 16 in Latvia and 11 in Lithuania. Grooming is only available in the larger stores, depending on the location and its potential. We have a total of 15 grooming salons.

Then there are our 15 clinics: seven in Estonia, four in Latvia and another four in Lithuania. Among these are two hospitals working 24/7. The clinics pre-date the Musti integration and are attached to larger stores, helping us cover all the major cities.

What do you consider when deciding where to open a grooming salon?

In smaller towns, groomers often work from home or their own premises, so we usually open in larger cities. We've actually closed some grooming salons in smaller towns. We research local demand and the number of existing service providers, before making a decision.

Which of PetCity's three markets is performing the best – and where are you looking to expand?

The economy is performing strongly in Lithuania now and it is definitely a growing market. Retail in Estonia has not yet returned to 2021 levels, while Latvia and Lithuania have already moved well beyond that point.

Given that investment resources are limited, we'll prioritize Lithuania. We aim to double

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our presence there within three years. So we're looking for good new locations – for both stores and clinics. Cities such as Kaunas and Klaipėda offer opportunities beyond the capital.

We may add a few locations in Latvia, where there's still more potential, although the market is concentrated around Riga and other cities are less strong. Estonia is close to full coverage. There may be one or two locations where we could expand, but we've covered most of the country.

How are you developing your e-commerce strategy?
We are waiting for further integration with Musti and upgrades to our website and customer experience. Online sales currently account for approximately 8-10% of total sales. Earlier this year, we were given the Estonian E-commerce Association's People's Favorite E-shop award, recognizing our e-store in the pet products category.

In May, we centralized online fulfillment, so that now all orders are picked at the warehouse in Tallinn. We also want to add brands that are available in the Nordic countries but not yet in Estonia, as well as exclusive online products. These additions should support growth next year.

How does the online assortment compare with the range in individual markets?
It is broadly comparable with the combined range available across our three markets. The selection differs by country, of course, because some brands are more popular in one country than in another.

What about in-store pickup?
In-store pickup is currently only available in Estonia. We are working on launching it in Latvia and Lithuania.

Which product categories are the best performers, and where's the greatest potential?
There are more dogs in Lithuania, while Latvia has more cat owners. Estonia is somewhere in between. Dog food sales are currently about twice those of cat food sales overall, but cat ownership is growing, as they can be easier to care for. We're also seeing growth in wet food and mixed feeding, as in other markets. Small animals account for only around 2-3% of total sales.

How about toys and treats, for cats in particular?
Cat toys grew by as much as 130% year on year last month. Toys and treats overall have increased by around 30-40% compared with last year. We now have Christmas, Halloween and summer collections, and these have proved popular. I believe we're among the leading retailers in our market for seasonal collections.

Is there any demand for alternative diets like freeze-dried and BARF?
Alternative diets, including insect-based products, freeze-dried food and BARF, remain a small part of our assortment. I believe the trend is growing, but average incomes in our markets are low, so customers tend to consider their spending carefully. Some are very interested in them, so they're a useful addition to our range.

How are own brands performing and do you plan to expand them?
We have two major own brand food ranges produced by Musti, and they compete with one another. The leading brand can change from month to month, with one often ranking among our top-selling products. We don't yet have our own frozen food range but expect to introduce one around the middle of next year.

Have you adapted your loyalty strategy?
We made a major change to our loyalty program because the previous system belonged to the former owners. We launched our own program in August 2025 and now have more than 100,000 members – a very good result in such a short time. We use the same program as our colleagues in Norway: every seventh bag of food or litter is free, as is every seventh in-store nail-clipping service.

How much do you expect this program to grow?
Over the next two years, increasing the number of loyalty members by 50% would be a good target. I'd say that's an ambitious but achievable goal.

Do you also have plans to expand your loyalty program for breeders?
Yes. We're developing a dedicated program for breeders and plan to launch it next year. This will mainly offer discounts on selected brands and services, including vaccinations, as well as special events.

What synergies do you see between your online and offline businesses?

Our stores vary greatly in size, from 50 to 600sq m. That makes it challenging to provide every customer with all they need at each location. We're therefore planning to let customers order any product available online and have it delivered to their local store.

Customers who visit a store and cannot find a product can order it with the help of a salesperson and collect it in the next couple of days. This model works well in the Nordic countries and would be particularly helpful for our smaller stores.

What are your plans for centralizing warehousing and distribution?

The Tallinn warehouse currently serves the e-store only. We don't think we need a separate warehouse in each country. If Musti has more capacity in its central warehouse in Finland, it may make sense to move our distribution there. The two locations are close, so there may be little benefit in operating them separately.

"Customers in our region are very brand oriented and quite loyal, so it takes time to introduce new products and change habits."

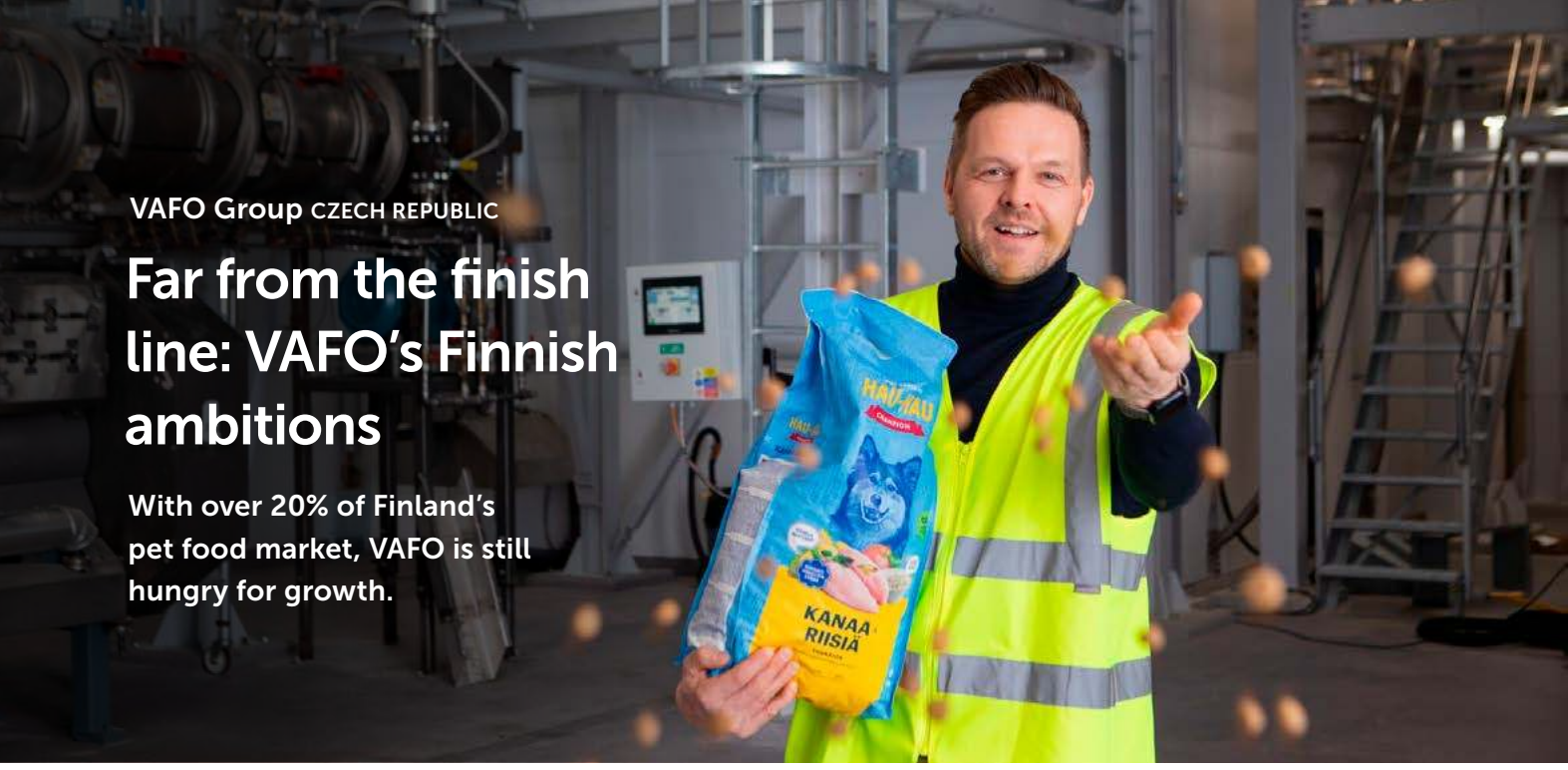
How are you currently using AI in your day-to-day operations?

At the moment, we mainly use AI to analyze and summarize results, provide suggestions and identify challenges. In the future, I'd like to see it help prepare staff schedules, as this could save store managers a significant amount of time.

What are the next key steps in the Musti Group integration?

We've not yet had enough time to develop the services side fully. And internally, we plan to introduce more of Musti's HR tools, including onboarding, training programs and additional training materials. So overall, we'll be mainly focusing on supporting our employees through training, while adding more services for pet owners. ◆





VAFO Group CZECH REPUBLIC

Far from the finish line: VAFO's Finnish ambitions

With over 20% of Finland's pet food market, VAFO is still hungry for growth.

VAFO Group, a leading European pet food company, has built a strong presence in Finland through strategic acquisitions and investments in local production, while also expanding its operations across the Nordic and Baltic region. Now, the group is focused on further strengthening its market position and leveraging its regional operations to serve both domestic and international markets.

VAFO Group's expansion into Finland began with Prima Pet Premium Oy, a long-standing business partner that later became part of the group. After years of cooperation, VAFO acquired a minority stake in the company in 2018, followed by its full acquisition, including its trading operations in Sweden and pet food production facility in Estonia. Prima Pet's portfolio includes Hau-Hau Champion, Finland's number one pet food brand.

The group further strengthened its manufacturing footprint by building a new dry food factory in Nokia, in south-western Finland, approximately 200km from Helsinki. The facility was completed in 2023, becoming the largest of its kind in Finland, with an annual production capacity of 20,000 tonnes of pet food.

Gaining market share

In 2024, VAFO made its second Finnish acquisition, Dagsmark Petfood. The deal included Dagsmark's production facility in Mellilä, approximately 60km north-east of Turku, which manufactures wet food for cats. Since then, Finland has become an increasingly important part of VAFO's business, accounting for approximately 10% of the group's turnover.

"Our Finnish operations have achieved strong volume and value growth in recent years, in both the mass market and pet specialty channels. We already hold a significant market share in both channels, so this is a good result," Timo Pärssinen, Commercial Director and Board Member of VAFO Group, tells PETS International.

"Annual growth has been between 5% and 10%, while retail pet food sales in Finland have been broadly flat in recent years," he adds.

Investing in capacity

Over the past year, VAFO completed a post-acquisition technical development project worth about €4 million ($4.6M) for the Mellilä site supporting Dagsmark Petfood.

"Wet food, for both dogs and cats, is our strongest performing category at the moment and we still see good opportunities in dog and cat treats. The expansion of our Mellilä factory will support further growth in wet food," Pärssinen says. "Wet food has also been the biggest change in our product split in recent years."

Pärssinen notes that the Mellilä factory is currently running at full capacity. A further investment of around €2.5 million ($2.9M) has been approved, which will double capacity to 50 million pouches a year. It is due to be operational in the fourth quarter of 2027.

At the Nokia plant, the group also upgraded the packaging hall and installed new machines, an investment of around €2 million ($2.3M). This allows more flexibility in formats and makes the

operation more efficient. "We hold more than 20% market share in Finland, but we are still hungry for growth. Our priority is to make full use of our new production capacity commercially," he says.

"We keep talking with our customers about how to serve them better, in both branded products and private labels. Wet food, especially cat pouch multipacks, and treats for dogs and cats are the areas where we see the most opportunity," he adds.

Tapping trade potential

The group also sees resilient e-commerce growth. And with Finland still importing nearly twice as much pet food as it produces, it sees room for domestic production to grow.

VAFO plans to use its Finnish sites to grow exports. Citing the Finnish Food Authority, Pärssinen says that Finnish pet food production has more than doubled in five years, to 36.4 million kg in 2025, of which around 10 million kg was exported.

Future-proofing operations

Cutting transport emissions

VAFO has moved production of its PrimaDog dry food brand to Nokia. Some of these products were previously made at other VAFO sites across Europe.

According to Pärssinen, the group believes in producing closer to its markets, as shorter transport distances help reduce its carbon footprint.

VAFO is committed to using renewable diesel for road transport. Between January and July 2026, Prima Pet, VAFO's Finnish subsidiary, cut emissions from domestic transport by 88.4% compared with fossil diesel, across about 6,700 tonnes of shipments.

The switch was made through Kaukokiito BIO, a renewable diesel service from logistics partner Kaukokiito, which delivers Prima Pet's Hau-Hau Champion, PrimaCat, PrimaDog and Dagsmark brands to retailers across Finland. Prima Pet was among the first companies to adopt the service when it launched in 2023.

"From an operational perspective, the Kaukokiito BIO service has enabled us to reduce the emissions associated with our shipments without requiring changes to our existing logistics arrangements. Using renewable diesel comes with a slight additional cost, but we see it as a worthwhile investment in reducing the climate impact of our logistics," Tiina Wemberg, Sustainability Specialist at Prima Pet Premium Oy, tells PETS International.

Looking ahead, VAFO intends to work with its logistics partners to reduce emissions from sea freight, which supports its imports. This includes exploring the potential use of lower-emission fuels and other solutions.

Packaging and sustainability targets

Beyond transport decarbonization, VAFO is working to improve packaging sustainability in Finland. Last year, PrimaDog's revamped packaging design won the WorldStar Global Packaging Award in both the Pet and Sustainability categories.

The redesign involved switching to more sustainable materials, including low-density polyethylene (LDPE) monomaterial, a single-material plastic packaging designed to improve recyclability. It also reduced the number of printing plates, helping to lower environmental impact, save on chemicals and energy, and shorten production times.

These efforts form part of VAFO's broader Sustainability Program 2025-2030, which includes targets related to renewable energy, resource efficiency, emissions and packaging.

The group aims to source 25% of its energy from renewable sources, including solar power and biogas, while investing in water recycling and heat recovery. It also targets 95% recyclable packaging and a 50% increase in the use of sustainable ingredients.

A long-term strategy

For VAFO, there is still room to grow in Finland's domestic pet food market. However, with its already large market share, fast turnover growth remains challenging.

"We still see big potential, especially in the mass market cat category, where we can seriously challenge multinational players like Mars and Nestlé. This is long-term work, and we will keep going," Pärssinen says.

The company remains open to further opportunities in the market. Pärssinen concludes: "If there is further local demand, we are ready to respond with additional production." ◆

VAFO Group
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The battle for the US basket

While the pet category continues to expand, grocery retailers are capturing a mere 20% of the market. However, recent data highlights significant opportunities to grow their share.





Doug Baker
Vice President Industry Relations
FMI – The Food Industry Association

The competition for pet care spending is increasingly being shaped by where and how consumers shop. It is notable that grocery is hardly benefiting from rising sales, as pet owners turn to mass retailers and online channels for their purchases.

High demand, changing expectations

The challenge is not declining demand – pet remains one of the most resilient growth areas across retail – but changing consumer expectations around convenience, subscription, pricing and assortment. As pet ownership continues to drive humanization trends, retailers must rethink how they position and serve the category to gain a greater share of the pet basket.

Recent research from the US food industry association FMI, in partnership with NielsenIQ and the market research company Circana, reveals the key factors influencing pet purchasing decisions. It also highlights why digital capabilities, loyalty-driven replenishment and specialized product offerings will define the next phase of competition in pet retail.

Large consumer base

The US pet category represents a $35.7 billion (€31.3B) retail market that is growing in sales value at a year-over-year (YoY) average of 2% across every sub-segment. Food, treats and supplies are all moving in the right direction at a time when many home, health and lifestyle categories are stagnating. The consumer base is enormous: nearly seven in 10 US households have a pet.

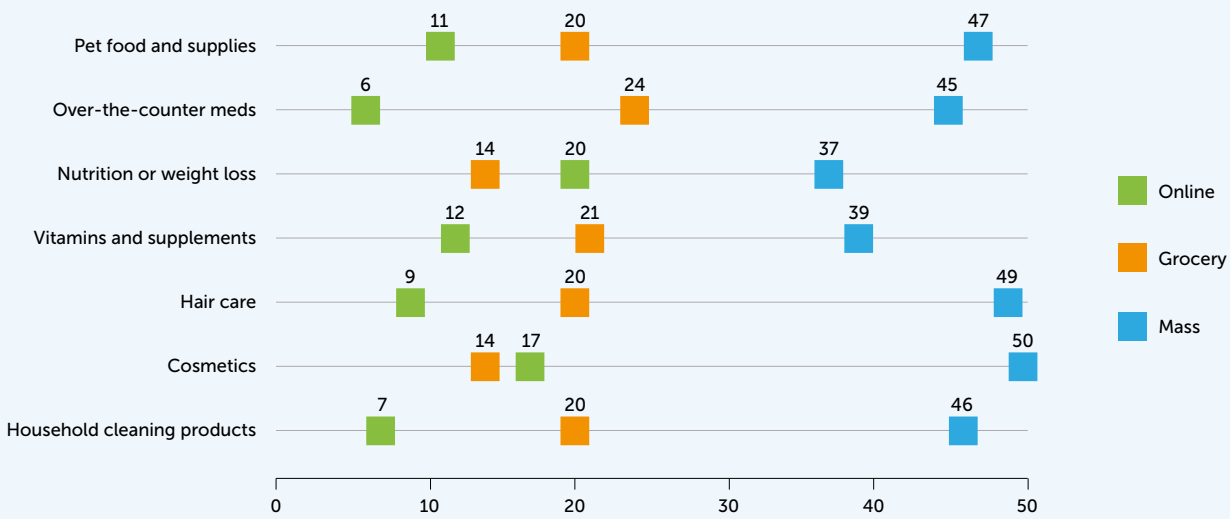
Yet grocery's share of that spending tells a different story. According to FMI's report The Power of Nonfoods at Retail 2026, mass retailers lead as the primary purchase channel for pet products at 47%, while grocery sits at just 20%, followed by online outlets at 11%. And grocery stores are, in general, the primary channel for 33% of the 2,100 respondents.

One interesting finding is that pet shoppers tend to frame their buying behavior as a grocery activity, even when they are not actually making those purchases at a grocery store.

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Where US consumers shop most frequently

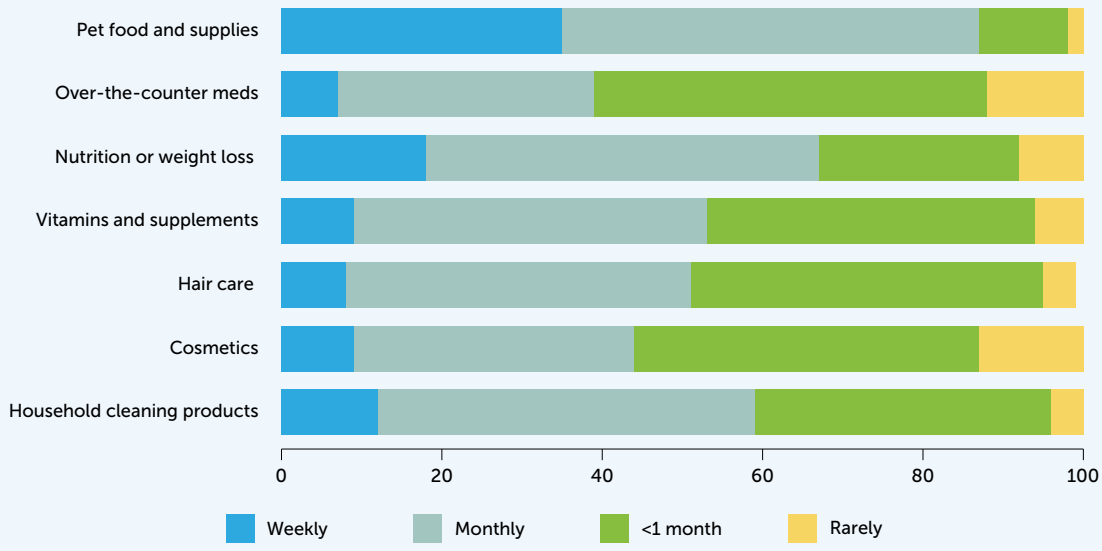
(in %)



Source: FMI, The Power of Nonfoods at Retail 2026

‘How often have you purchased each of the following?’

(in %)



Source: FMI The Power of Nonfoods at Retail 2026

Planned weekly purchases

A whopping 80% of pet purchases are described by shoppers as part of a normal shopping trip as opposed to a special destination run – above the average of 72% for all nonfood purchases.

Among pet consumers, 79% say these are planned purchases – the highest percentage when the respondents are asked to state whether their different types of nonfood purchases are planned or impulse buys.

Some 87% of grocery shoppers who buy pet food and other pet products do so monthly, with 35% purchasing them weekly. This translates into a purchase frequency that rivals or exceeds that of nearly every other nonfood category in the research, particularly the weekly shop, which is twice that of any other category.

Understanding the grocery bypass

The big question is: if a shopper factors pet products into their routine grocery tab, what’s stopping them from spending those dollars in their grocery store?

The FMI report contains compelling clues. One of these is cost as the primary reason consumers bypass grocery stores for pet purchases. This is cited by 36% of pet shoppers, although mentioned by fewer respondents than for most other nonfood purchases.

The next main reason given is general affordability, at 23%. Other reasons include a lack of variety (20%), preferred brands (20%) and pack sizes (16%) – the latter two are significantly higher than for all other types of nonfood purchases.

Further complicating these price perception and assortment issues is the elasticity of pet shoppers. A fifth of them (21%) changed their primary purchase outlet for pet products in the past 12 months, slightly more than the average for nonfood purchases in general.

Digital capabilities, loyalty-driven replenishment and specialized product offerings will define the next phase of competition in pet retail.

Online gives ease of purchase

Looking at the e-commerce data from the Digital Engagement Transforms Grocery Shopping 2026 study together with the nonfoods findings, the picture sharpens considerably. Of total pet care department sales, 44.3% were made online. It's a similar picture for health and beauty and baby care purchases.

Further underscoring this shift is the 9.9% YoY gain in online pet care sales, contrasted with a significant 2.2% decline in in-store pet sales.

More telling is how pet shoppers buy online: 92% of digital pet care purchases are fulfilled via shipping and delivery, often through subscription-based recurring shipments. Again, this is comparable to health and beauty (93%) and baby care (85%), and much higher than in the general food segment (62%). When asked why they buy pet products more frequently online, 55% of pet parents cite ease of purchase as their top motivator.

Sit. Stay. Subscribe

Delivery speed was identified as another major competitive battleground in the digital engagement study, which found that the average number of days from order to delivery has dropped from 6.4 days in 2018 to 3.1 days in 2025.

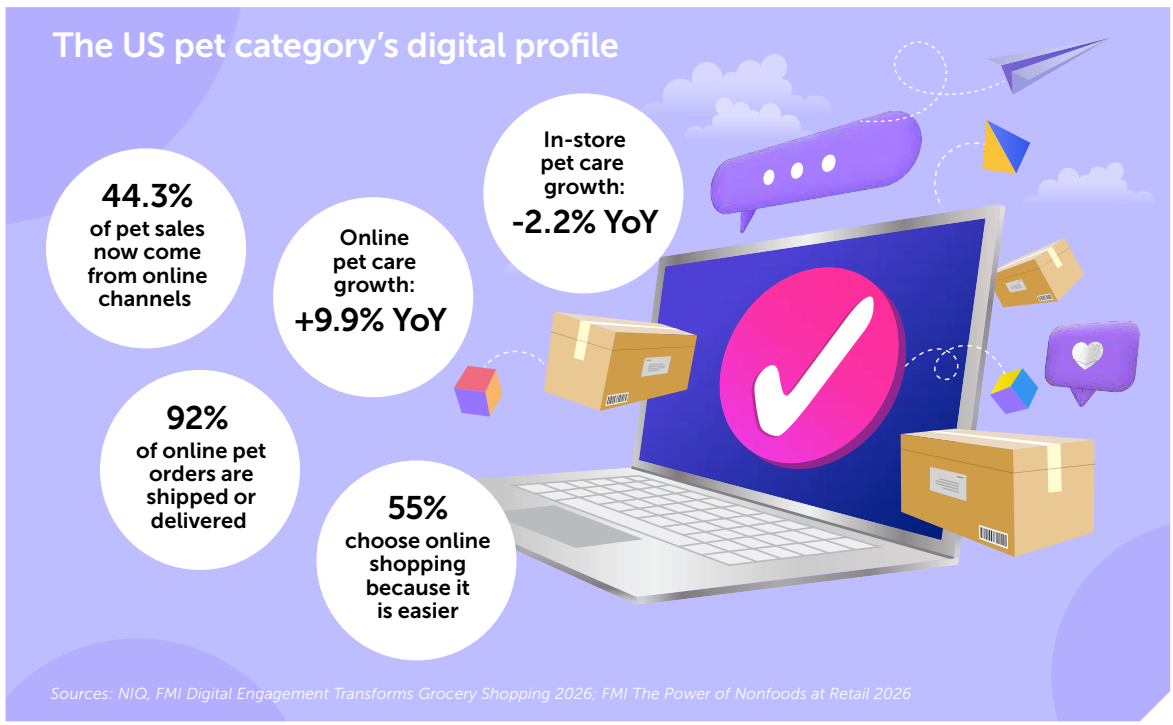
But speed alone does not solve the subscription problem. A pet shopper who runs out of dog food on a Thursday is not looking for next-day delivery from a grocery app they've never set up. They already have an order arriving on Friday from the retailer that captured their subscription months ago via autoship. Once that recurring purchase relationship is established, it's extraordinarily difficult to disrupt.

Digital shopping assistants

Another significant finding in the digital engagement report concerns the projected future use of personal digital shopping assistants. Some 84% of shoppers identified at least one way they could foresee using these assistants.

This varies between store recommendations (12%) and getting recipes (26%) to finding specific product information (19%) – the latter being something both pet food manufacturers and retailers might need to take into account in the future.

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Many of the other ways identified involve saving money and managing recurring needs. Automating repeat grocery orders was mentioned by 13% of respondents – a modest number today, but one indicating where AI-assisted and agentic shopping is heading.

The grocery retailer that builds a robust subscription infrastructure will be far better positioned when agentic shopping becomes the norm, and AI agents begin executing routine replenishment on behalf of consumers.

Taking positive steps

The encouraging news for grocery is that none of the hurdles to capturing a greater share of pet dollars are insurmountable. Maintaining the built-in relationship, physical footprint and foot-traffic frequency advantages can help the retail channel to reclaim the pet category. The question is whether the pressing nature of the data will translate into the urgency of the response. ◆



Top ways to reclaim the pet segment

Considering that both the nonfoods and digital engagement reports point to the same set of imperatives, FMI recommendations for the food retail industry include these four strategies:

Building capabilities

This is the most urgent and least addressed gap for the grocery channel, as it already possesses loyalty data, fulfillment infrastructure and existing shopper relationships. What food retailers lack is an auto-replenishment offering for pet products tied to existing loyalty program discounts. This would directly address the price perception barrier, while building the kind of recurring revenue relationships that pure play e-commerce has spent years establishing.

Closing the price perception gap

Whether through competitive pricing, loyalty-integrated promotions or private label investment, grocers must address the cost barrier that 36% of bypassed pet shoppers cite as their primary reason for shopping elsewhere. Private label has a meaningful runway in pet, but only if retailers invest in genuine ingredient quality and clear communication, rather than just offering a cheaper alternative.

Expanding the assortment

One in five pet shoppers bypasses grocery because a store does not carry their preferred brands, and 16% cite pack size gaps. The category has become highly specialized, premiumized and formula-specific as pet humanization has accelerated. An expansive pet section signals to serious owners that your grocery store is the right destination for their pet products.

Investing in content and search visibility

AI is compressing the digital shelf to as few as one or two visible SKUs. Grocery retailers and their pet brand partners who fail to invest in product content, taxonomy and digital shelf optimization will find themselves invisible as agentic shopping accelerates.



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