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Pets at play

Research by PETS International and Loop provides insights into how and why owners buy toys for their dogs and cats.

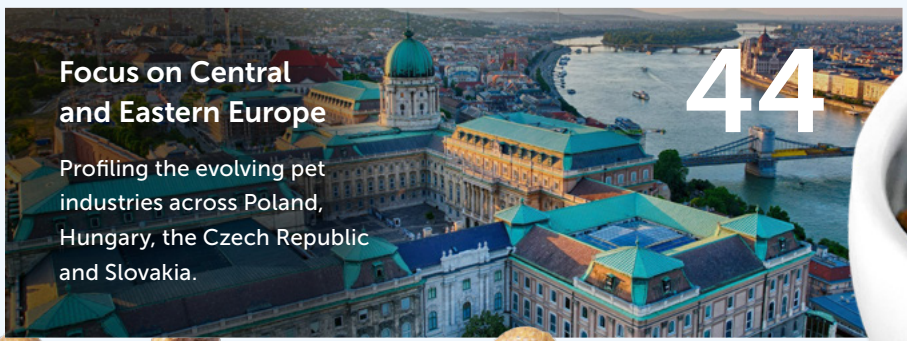
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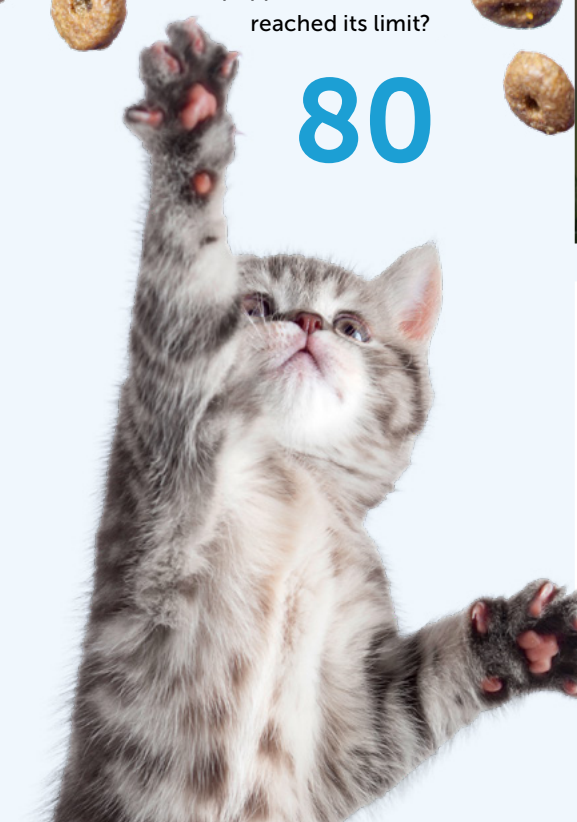
Profiling the evolving pet industries across Poland, Hungary, the Czech Republic and Slovakia.

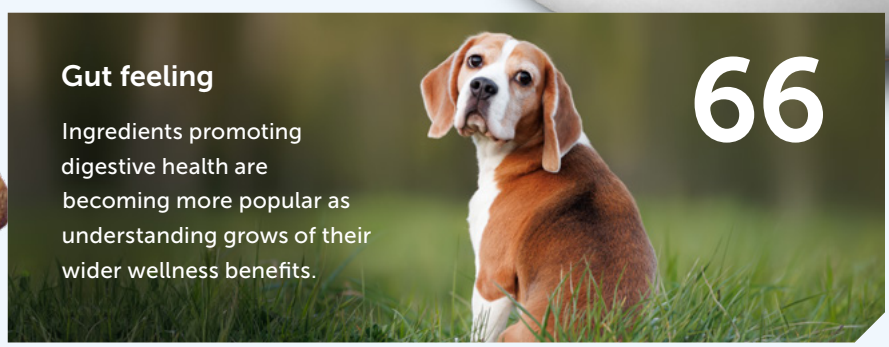
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True passion.
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petfood with passion

Resilience and opportunity

This summer has been an intense one for the global economy: US tariff policies have shaken markets, production sectors and supply chains.

Once again, the pet industry shows resilience in the face of these challenges – challenges that could drive up raw material costs, increase shelf prices and ultimately lead pet parents to seek more affordable options for non-consumable products such as accessories. Our recent survey on pet toy spending reveals notable trends on both sides of the Atlantic, which you can explore in this issue.

More than 7 out of 10 of our readers acknowledge that this shift in trade policy will affect their businesses. However, this can also be seen as an opportunity. The industry, with its strong international presence, is well positioned to continue diversifying suppliers and exploring new markets worldwide.

Looking ahead, the outlook remains positive. According to Euromonitor's latest forecast, the global pet care market is set to reach $189.7 billion (€162.9B) in 2025, reflecting 4.8% growth, with an even stronger 6% increase projected for the coming year.

While these figures fall short of the double-digit growth seen in the pandemic years, they remain a strong indicator of the industry's continued vitality.

Wishing you an inspiring read.





David Palacios Rubio
Editor-in-Chief

> **The secret of change is to focus all of your energy not on fighting the old, but on building the new.**
> DAN MILLMAN, AUTHOR

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UAE: The Petshop expands with fresh acquisition

Dubai-based retailer The Petshop is setting the stage for regional expansion by adding competitor PetHaus to its portfolio with the aim of consolidating the UAE’s fragmented pet care market, expanding its retail presence and enhancing its range of services.

“PetHaus’s established presence in key Dubai locations, its complementary services like cat boarding and its loyal customer base made it a natural fit for The Petshop’s growth ambitions,” The Petshop’s CEO Amr Hazem says.

Petdirect CEO commits to more NZ openings

New Zealander pet supplies retailer Petdirect, which launched its first brick-and-mortar location in 2024, is set to open more physical stores.

Petdirect CEO Dave Anderson tells PETS International that there is an unmet demand in the country: “While we hold a solid grip and majority share in the New Zealand online pet market, we recognized that the overall physical retail channel for pet products is significantly larger, measuring approximately 4 times the size of the online market.”



Singapore green lights sale of cultivated meat pet food

Singapore’s Animal & Veterinary Services (AVS) has granted regulatory approval to Californian company Friends & Family to sell cultivated meat-based pet food in the country. As a result, the firm is set to launch freeze-dried lab-grown meat treats for cats and dogs this fall.

The approval marks a milestone for the pet food industry, making the company the first to offer cultured meat-based pet treats in Southeast Asia. The company produces human-grade cultivated meat from the cells of Kampung chickens, a breed native to Malaysia and Indonesia.





IPN targets French DTC player

UK pet food manufacturer Inspired Pet Nutrition (IPN) has entered into exclusive discussions with investment group Eurazeo for the acquisition of French online pet food player Ultra Premium Direct (UPD).

Under the agreement, Eurazeo, Eutopia and other minority shareholders would sell IPN their entire stake in UPD. The deal is expected to close in the fourth quarter of 2025. IPN notes that the UPD acquisition will create a major independent and international branded pet food platform in Europe.

"It brings a sophisticated and proven e-commerce platform with international growth potential, a rapidly expanding mono-brand store network and another outstanding brand to our platform," says IPN CEO Arthur van Benthem.

ZooRoyal heralds success of store pilot

A 2-year, 4-store pilot in Hamburg has resulted in German retailer REWE Group's nationwide expansion of its ZooRoyal pet care stores being green lit.

The almost 100-year-old company is the country's second-largest supermarket player and operates as a cooperative with stores across 21 countries.

"All pilot stores in the Hamburg area got off to an extraordinarily successful start and have since enjoyed continuous positive development," Marcel Bersch, Managing Director for ZooRoyal Petcare at REWE Group, tells PETS International.

The retailer will consider city locations for expansion due to the high number of pets relative to the human population. The ZooRoyal stores will all be operated by independent REWE retailers and not be required to be adjacent to food stores.



Pet food trade body joins push back on EU waste sorting guidelines

The European Pet Food Industry Federation (FEDIAF) has joined a coalition of 70 European associations from across the packaging value chain in calling on the European Commission to reconsider the current direction of the Joint Research Centre's (JRC) draft guidelines on EU waste sorting labels.

The new framework, developed as part of the Packaging and Packaging Waste Regulation (PPWR), aims to standardize the labeling of packaging and receptacles to improve waste separation and recycling rates. However, the coalition argues that the proposed sorting instructions could fragment the EU Single Market, increase operational burdens for businesses and create confusion among consumers.

"As a consequence, a product would have to carry a label with up to 24 local terms, also contravening the objective of the labeling scheme to make sorting instructions clearer to consumers," notes a joint statement.





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Petlove protests Petz-Cobasi merger

Brazilian online retailer Petlove has appealed the decision made in June by Brazil's Administrative Council for Economic Defense (CADE) granting unconditional approval for a merger between pet retailers Petz and Cobasi, after the antitrust body concluded that the move poses no significant risk to competition in the pet market.

Petlove believes CADE should reject the current merger to prevent "irreparable" harm to competition and consumers. The appeal, filed on 18 June, argues that the 2 companies are currently the dominant players in the pet market and the only ones that effectively compete with one another.

CADE now has until 1 January 2026 to conclude a review of the case. Until then, the merger, which was announced in April 2024, is temporarily on hold.

General Mills brings Edgard & Cooper to US

Minnesota-headquartered General Mills launched its European pet food brand, Edgard & Cooper, in the US market in July through a retail partnership with pet chain PetSmart.

The US manufacturer says that the launch is aimed at younger pet owners, which it identifies as the fastest-growing demographic.

"Pet parents are redefining how they feed and treat their pets, and at General Mills, we're listening and continuing to bring trusted, high-quality natural solutions to a rapidly evolving marketplace," says Liz Mascolo, Segment President for the North America Pet Segment at General Mills.

Edgard & Cooper products include dry food, wet food and treats formulated to support dogs of all breeds and life stages.



EU takes major step forward on animal welfare standards

In a significant advance for pet welfare, the European Parliament has backed the first-ever EU-wide minimum standards for dog and cat breeding, keeping and traceability.

In a plenary vote on 19 June, MEPs approved the draft regulation with proposed new rules including: mandatory microchipping and EU registration; a ban on the sales of cats and dogs in pet shops; compulsory microchipping and registration of animals entering the EU; and Member States to oversee training for breeders and animal handlers, with buyers receiving clear guidance on responsible pet ownership and care.

Following the EU Parliament's vote, the regulation now enters the trilogue phase, where the Council and Commission will finalize the details. "While further dialogue will be needed to fine-tune some details, I believe we are united in our aim to protect the welfare of dogs and cats," says Rapporteur and Chair of the Agriculture and Rural Development Committee, Veronika Vrecionová.





Survey tracks generational shifts

A survey commissioned by US pet insurance company Figo of over 2,000 US adults examines how attitudes, values and spending habits differ among the generations.

48% of pet parents report their pets suffering from separation anxiety and 58% say they bring their pets on overnight trips.

Nearly 6 out of 10 respondents say they always research their pets' food and many, particularly among Gen Z, prepare home-cooked meals or snacks for their pets. Pets also increasingly influence broader life choices – according to the survey, 60% of pet parents now consider their pets a key factor in deciding where to live, with Gen Z leading this trend at 57%.

USDA U-turn on organic pet food regulation sparks industry backlash

A proposed rollback of a 2024 US Department of Agriculture (USDA) rule affecting organic pet food is facing opposition. The Market Development for Mushrooms and Pet Food rule, due to come into force in February 2025, established standards for the use of organic mushrooms in pet food. However, a regulatory freeze put it on hold until March, with a compliance deadline of March 2027.

Additionally, the USDA has launched a consultation process, announcing a proposal to rescind the rule. The Organic Trade Association (OTA) and The Pet Sustainability Coalition (PSC) are among who have voiced opposition to the move.





UK pushes ruling on vet market to 2026

The Competition and Markets Authority (CMA) is extending its investigation into anti-competitive practices in the UK's veterinary sector. The UK consumer protection watchdog has announced it is moving the deadline for the final decision of the inquiry from the end of November 2025 to February 2026. After a provisional decision, response hearings are scheduled for October.

The CMA's preliminary investigation found that some pet owners were finding it difficult "to access basic information like price lists and prescription costs", leading them to pay more for medicines. Speaking after the CMA extended its deadline, the British Veterinary Association (BVA) said it was disappointing, especially for frontline staff who have faced negative headlines due to the inquiry.



PET INDUSTRY FACT FILE

DATA INSIGHT

+183%

Spending on pet cleaning supplies is expected to see its largest increase this year, according to Rover's True Cost of Pet Parenthood Report 2025.

NEW APPOINTMENTS

Pet Circle

Alistair Venn is the new CEO of the Australian online pet retailer.

PetSmart

The US pet chain has appointed Jesica Duarte as Executive Vice President and Chief Commercial Officer.

Alphia

The Colorado-based private label pet food manufacturer has named Miguel Nistal as interim CEO following the retirement of David McLain.



TOP 3 INVESTMENTS

GPS tracking and health monitoring platform Tractive has acquired **Whistle**, a pet wearables brand and a subsidiary of Mars Petcare.

Membership-based veterinary clinic player **Small Door Veterinary** has successfully raised $55 million (€47.2M) in Series B funding.

Pet wellness brand **Other Half** has secured $3 million (€2.6M) in its first seed funding round. The brand is the latest venture from Zesty Paws founder AJ Patel.

TOP WEB NEWS

Tom&Co launches 'emotional' campaign

Belgian pet retailer's new branding spotlights empathy, family bonding and a care culture.

LATEST NEWS



New data unpacks consumer habits in pet toys

Exclusive research explores spending patterns, safety concerns and the other factors that are currently driving sales among cat and dog owners.



Diana Dominguez
Business Reporter
GlobalPETS

Findings from a recent survey conducted by PETS International and Loop seem to indicate a modest shift toward more conservative toy spending in 2025 compared to 2024. This is particularly evident among pet parents who have spent higher amounts in the past.

Multiple pet ownership

Almost 2,000 pet owners from the UK, France, the US, Canada, Brazil and Mexico took part in the research. Of those surveyed, 67% own cats, 58% own dogs, 4% have fish, 2% have rabbits, 1% have guinea pigs and another 1% have hamsters.

The respondents answered the questions based on their toy purchasing for 1 or more dogs or cats. Among cat owners, 45% had 1 cat, 28% had 2, and 26% had 3 or more. Among dog owners, 64% had 1 dog, 23% had 2, and 13% had 3 or more.

Spend and retail channel preferences

Cat and dog owners who have spent between $50 (€43) and $99 (€85) on pet toys so far this year represent 18% of the respondents. A further 10% have spent $100 (€86) or more up to now, according to the data. More than 41% have spent under $25 (€21), with 31% spending between $25 (€21) and $49 (€42). Comparing these 2 quarters of spending to the whole of 2024 shows some increases in the lower price ranges and decreases in the higher price ranges.

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Top 5 factors influencing pet toy purchases*

1	2	3	4	5
Safety	Durability	Price	Quality	Solo play
71%	70%	67%	52%	47%

Source: Loop-PETS International, July 2025, (n=1,970) in UK, France, US, Canada, Brazil and Mexico.
**Multiple responses allowed*

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Many pet owners buy toys in more than 1 retail channel. Pet specialty stores is the preferred option for purchasing toys, with nearly 7 in 10 survey respondents (69%) buying there. This is followed by online retailers (62%), discounters (45%) and supermarkets (37%). Some 27% also buy from independent or local shops and 13% buy from vet clinics.

Less frequency and more budgeting

Some 3 in 10 respondents say they bought toys 2-3 times during 2024, with 19% indicating a frequency of 4-6, and 26% making purchases more than 6 times last year. Only 15% say they never bought toys, and 9% purchased them once.

When asked about their plans for purchasing toys within the next 12 months, 19% of the dog and cat owners say that they're expecting to cut back. Over 7 in 10 (71%) expect to spend the same, while 10% plan to spend more. Currently, pet owners appear to be buying toys less frequently, but whether that will continue for the rest of the year remains to be seen.

Specific groups of respondents are planning to buy pet toys more frequently in the next 12 months: Gen Z (24%) and Brazilian cat and dog owners (24%), while the global average is 17%. Meanwhile, baby boomers (15%) and French pet owners (18%) plan to spend less on pet toys over the same period.

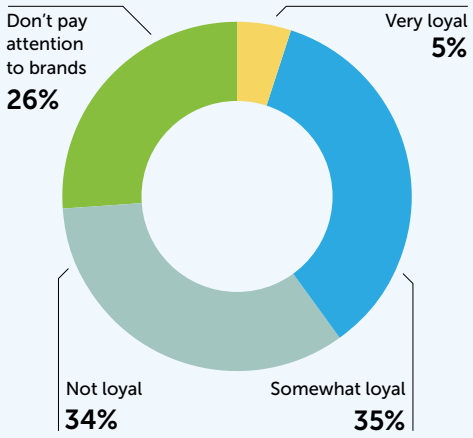
Interestingly, male pet owners seem to buy toys less frequently, with nearly 3 in 10 (28%) only making one-time purchases (the global figure is 20%) and 12% never buying toys at all, compared to the 19% and 8% respectively indicated by female pet owners.

Practicality vs loyalty

Pet parents value practicality over brand loyalty when it comes to purchasing pet toys. About a third (35%) say they have brand preferences but are open to trying new options. This is most notable among millennial (38%) and US (41%) respondents.

Only 5% of respondents to the survey say they are very loyal to specific brands, while 26% of all cat and dog owners don't pay attention to brands at all.

'How loyal are you to specific toy brands?'



Source: Loop-PETS International, July 2025, (n=1,970) in UK, France, US, Canada, Brazil and Mexico

Meanwhile, 34% say they're not at all loyal to brands, basing their purchases solely on availability and price. Only 5% of respondents to the Loop-PETS International survey say they are very loyal to specific brands, while 26% of all cat and dog owners don't pay attention to brands at all. Where there is brand loyalty, it is seen more among male pet owners (8%) than female pet owners (4%).

Influence of product reviews

Product reviews are the most notable influence on pet owners when they purchase toys (57%). This is followed by peer recommendations and packaging design (both 34%), social media platforms and vet advice (both 25%), online ads (18%) and store staff (16%).

The influence of social media (34%), veterinary advice (32%) and packaging design (40%) is most significant among Gen Z respondents. Petfluencers and pet events are evidently not yet seen to be very important among this group (7% and 8% respectively) – at least not when it comes to toys.

Other significant global findings are that peer recommendations are the most influential among Canadian (43%) and UK (44%) respondents. And product reviews are particularly highly

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valued by US pet owners (64%), while UK owners trust the information given at pet events or fairs (14%). Veterinary advice is commonly cited by Brazilian respondents (36%), while store staff recommendations also have a significant influence on Canadian (24%) and French (23%) respondents.

An eye for quality

Pet owners don't only buy what's available – they also look for quality in general. More than 7 in 10 (71%) of the survey respondents say they look into the safety of pet toys before buying, followed by durability (70%), price (67%) and the quality of components (52%). On the flip side, few respondents look at recycled/eco-friendly components (13%), brand (6%), origin (6%) or packaging (5%) when purchasing toys for their pets.

Some cat and dog owners say that a pet toy needs to be suitable for solo play (47%). Design and utility are less important, both at 33%. While electronic toys are starting to gain traction among pet owners (34%), the majority (66%) haven't yet bought one.

Notably, durability and utility are most frequently cited by Gen Z pet owners as important factors for purchasing, at 74% and 38% respectively. Brand is more often a consideration for millennials (8%) than for older or younger pet owners, while product origin is most often mentioned by boomers (17%).

Country-wise, price is most valued by Canadians and Americans, with 75% of respondents in each country citing it as a key factor. Utility ranks the highest among respondents in Brazil, France and Mexico. Americans place the most importance on durability (77%) and safety (78%), as well as price (75%), although they also value design (39%). Design is similarly valued by UK (42%) and Mexican (41%) respondents.

Mental and physical benefits

For the vast majority of respondents (88%), pet toys serve as a way to relieve their pet's boredom. Beyond entertainment, toys are also seen as beneficial to a pet's health, encouraging physical exercise (76%), providing mental stimulation (70%) and helping reduce separation anxiety (45%). Additionally, pet parents say that toys help

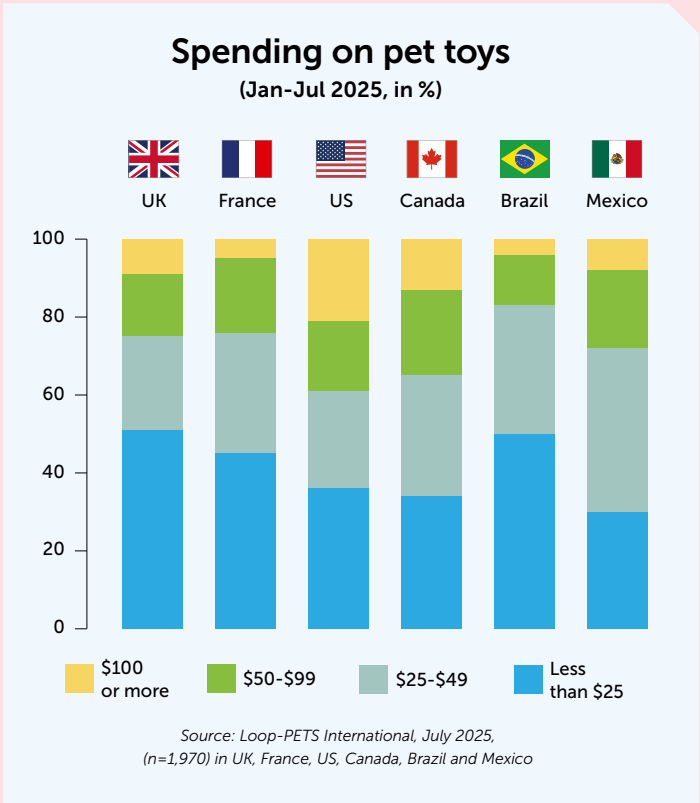
The impact of delivery on demand

Delivery platforms such as Deliveroo, Uber Eats and Just Eat have begun expanding their offerings to include pet supplies, partnering with pet retailers to deliver a selection of items directly to people's homes. This channel is still niche, with just 4% of the survey respondents stating that they buy pet toys through these platforms regularly, and 11% saying they do so occasionally.

Brazilian pet owners show the highest interest in delivery platforms, with 18% of the respondents there buying pet toys on these platforms occasionally, and an additional 6% saying they do so regularly. Pet parents in the UK and the US are not yet very keen on using the platforms for pet toys, with only 9% buying toys that way occasionally. Canadian respondents have the least interest, with 90% never using them.

Most of these 300 respondents (46%) buy pet toys on delivery platforms 1-2 times per year. 45% of respondents do so sometimes (3-6 times) and 10% use them often (more than 6 times).

Looking ahead, nearly 4 out of 10 respondents (38%) say they don't plan to use delivery platforms at all over the next 12 months, while 36% intend to buy rarely, 21% sometimes and only 6% often.



Source: Loop-PETS International, July 2025, (n=1,970) in UK, France, US, Canada, Brazil and Mexico

distract pets from destructive behavior (44%), support dental health (39%) and assist with training (20%).

Half of Gen Z cat and dog owners agree that they use pet toys to reduce separation anxiety (50%) and distract their pets from destructive behavior (48%), while nearly 8 in 10 boomers (78%) say that toys are important to provide their pet with mental stimulation.

Safety considerations

There are safety concerns too, with more than half of pet owners (56%) reporting having had concerns with a pet toy. The most common issues are ingestion of parts (83%) and choking hazards (76%), followed by sharp or dangerous parts (58%), poor quality materials (51%), eye damage (27%) and allergic reactions (20%).

As a safety precaution, pet owners avoid specific materials when buying pet toys. For chewy toys, these include rawhide bones (53%), marrow bones (42%), stuffed plushies (33%) and rope toys (14%).

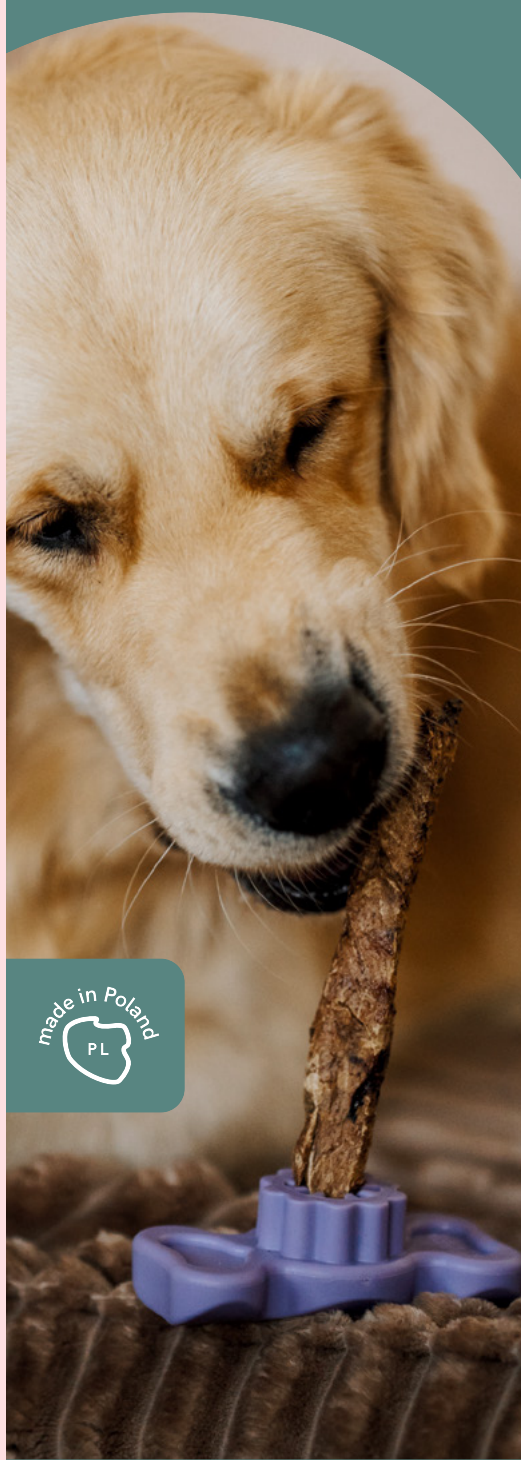
In general, respondents say they avoid laser toys (28%), string toys (22%), feather toys (20%), stuffed plushies (15%) and wand or fishing rod toys (9%). ◆

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Play time: e-commerce, subscriptions and standards



PETS International examines key trends in the online world of pet toys, and delves into the issue of regulation in an expanding global market.



Ivana Crnec
Contributor
PETS International

The global pet toys market was valued at $9 billion (€7.7B) last year and is expected to reach $15.3 billion (€13B) by 2032, according to Fortune Business Insights. In the past 5 years, pet e-commerce has developed as online companies promise innovation, q-commerce offers ever-faster speeds of delivery and subscription programs become more sophisticated and personalized. As the sector expands, the question of safety standards is increasingly being raised.

Pet toys in e-commerce

Traditional brick-and-mortar pet stores remain strong players in the pet sector, but data from Euromonitor International indicates that nearly one-third of global pet care sales, which includes toys, are expected to be made through e-commerce by 2026.

Standing out in a crowded marketplace and building a solid online presence, however, are not easy tasks. Providing a USP is one way. Irish company K9Connectables offers enrichment dog toys, with the aim of offering mental stimulation through chewable puzzle toys of varying complexity. The company's social media shows how it has connected with pet parents online, building a presence to also enable it to supply to pet shops.

Online pet toy brands also target consumers' increasing expectations of convenience. "Selling online gave us full control to connect with dog parents in a more meaningful way, while also making the process simple, fun, and convenient," says Anthony Smith, the co-founder of Sniff 'n Snack, a California-based subscription business that delivers 2 healthy treats and 2 engaging toys each month tailored to a dog's profile, taking into account factors such as gender, age and allergies.

Sharing on social media

Social media and targeted advertising are the primary digital marketing strategies pet toy brands use to reach customers and get their products noticed. Subscription service BarkBox by omnichannel pet retailer BARK, another which delivers toys alongside snacks, has driven engagement on Instagram by leveraging user-generated content of dogs enjoying its products and promoting interaction through Instagram Reels.

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BARK has recently posted its financial results for the fiscal first quarter ending 30 June 2025 showing that it achieved its strongest DTC gross margin quarter to date. Revenue was $102.9 million (€87.9M) ahead of the company's guidance range as it acquired more new subscriptions than expected and experienced a greater shift towards higher-value subscriptions.

To be successful, pet toy brands must understand their target audience and the platforms they are utilizing. For instance, women splurge more on pet toys than men – a 2023 LendingTree report shows that female customers lavish an average of $643 (€549) annually on "pets, toys, hobbies, and playground equipment", while males spend only $458 (€391). "Most of our customers are women between 25 and 50 who consider their dog a true family member," notes Debs Riley, Director of UK dog subscription service Woofbox.

Q-commerce considerations

As e-commerce has become a mainstay of everyday shopping habits, q-commerce is sought out for its fast delivery times, typically under an hour, which beat the delivery options offered by longstanding online giants such as Amazon.

In India, platforms such as Blinkit and Swiggy Instamart offer dozens of small pet toys, including plush toys, rubber balls and chew toys, as well as larger items such as cat toy trees and pet tunnels, for immediate dispatch. In the US, the largest q-commerce players have yet to move into this area to the same extent, with GoPuff offering only a few small pet play items. DoorDash, meanwhile, partners with pet stores and general stores to offer pet toys if available.

Renewing the subscription box

The pet subscription box market was valued at $823.5 million (€703.7M) in 2024 and is forecasted to reach $1,674.3 million (€1,430.6M) by the end of 2030, representing a yearly growth rate of 15.24%, according to Virtue Market Research.

Providing a specialized, curated and constantly evolving offering is something that clearly appeals to pet parents. "We can reach cat families, regardless of where they live," says Ryan Lee, co-founder and Head of Marketing at Meogic Box, a bi-monthly subscription service offering premium cat toys and cat-themed gifts and surprises for their families. "Customers are looking for ways to discover new things. Subscription models are a fun and low-effort way to consistently engage with pets."

The market now offers subscription boxes with various combinations of treats and pet toy types for different breeds, sizes and ages. "Plush toys are still the most popular across the board, but we're seeing increased interest in tougher toys like rope or thermo-plastic rubber options, especially from owners of larger breeds or younger dogs who are teething," reports Riley, whose company Woofbox has plans to introduce a toys-only box to its range in the coming months.

Boxes are also leveraging increasing levels of personalization and premiumization. The Super Chewer box from BARK targets dogs who chew heavily with boxes containing ultra-durable toys tailored to chew and play styles. "A well-designed subscription can support enrichment without the owner needing to constantly research or shop around," adds Riley.

As well as discounts or free gifts on sign-up, subscription-based companies are looking at other ways of adding value to their boxes. In addition to monthly themed toys and healthy snacks, Dublin-headquartered business BusterBox has recently added access to video calls with experienced vets to the benefits it offers members.

Where are safety standards?

New toys for pets are launched daily but, despite their proliferation, there are few safety standards in place for these products. There is virtually no regulation in the US, while in the EU, pet toys aren't covered by the Toy Safety Directive, although they must still follow important safety rules around general consumer

Providing a specialized, curated and constantly evolving subscription box offering is something that clearly appeals to pet parents.

product safety and chemical regulation. This mainly means complying with the General Product Safety Regulation (GPSR), which has been in full effect since December 2024.

"There is a dichotomy between where we are as an advanced and booming pet marketplace and the laws dictating the safety of pet toys," says Keith Rhoades, Global Director of Rise at Intertek, a safety testing company.

The lack of pet toy safety standards is not just about the loose definitions of labels like 'unbreakable' or 'indestructible', it is also about potential dangers lurking within products, such as heavy metals like lead and cadmium, micro-plastics and choking hazards.

Taking the initiative

The Ecology Center, a US nonprofit environmental organization, analyzed the safety of various pet products and found that 48% of the tested tennis balls contained detectable levels of lead. In fact, tennis balls made exclusively for dogs were more likely to contain lead than standard sport balls.

Intertek understands the market's problem and offers a solution in the shape of a patented pet-safe material, and also provides technical expertise and industry insights to help manufacturers craft safe pet toys.

BARK is one retailer that has led the way in this area, after announcing last year that it is leading an initiative to standardize pet toy safety on a global level and partnering with ASTM, an international standards organization. Other individual companies have made their own rules.

Chicago-based dog subscription company PupBox, for instance, publishes a list of substances that are banned from its products – showing that in the absence of industry-wide standards, businesses see the value of taking the initiative. ◆



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US tariffs put pressure on e-commerce merchants

Although apprehension is widespread, causing both increasing uneasiness in the business community and price rises, research shows that strategic approaches vary according to region.



Thaís Matos
Senior Business Reporter
GlobalPETS

The trade tariffs announced earlier this year by US President Donald Trump came into effect in early August. Some are the result of negotiations – e.g. those imposed on the EU and the UK – while levies on important partners such as China and Mexico are still not finalized. Brazil faces one of the highest rates.

Living in uncertain times

A survey conducted by Talker Research between May and June investigated the impact of months of uncertainty about the direction of the whole tariff policy. The findings show that almost 8 in 10 e-commerce merchants are concerned about its effect on their businesses in the next 6 to 12 months.

This data was drawn from 800 e-commerce merchants across Brazil, Mexico, the UK and the US.

Prices on the frontline

The results of the survey reveal growing pressure on prices, especially in emerging countries. More than half of the online merchants surveyed fear the impact on product pricing: 30% have already increased prices and 34% expect to increase them soon. But the effect could be even greater in the near future, as another third of the respondents say they are holding prices while following the policy outcomes closely.

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Almost 8 in 10 e-commerce merchants are concerned about the effect of US tariff policy on their businesses in the next 6 to 12 months.

Data from research platform DataWeave shows a persistent increase in the prices of products sold by Amazon in the wake of the tariffs. Analysis of Amazon Prime Day 2025 results reveals price pressure, particularly in export-dependent categories such as electronics and home goods.

This has also spilt over into the pet category. Speaking to the U.S. Chamber of Commerce, Israel Maynard, COO of dog crate producer DIGGS, says that they've had to raise prices twice and are looking at sourcing options outside China.

Supply chain maneuvering

Retailers have felt logistical effects too, with 73% of the Talker survey respondents reporting that tariffs have disrupted or delayed their supply chain, sometimes significantly. But although prices have been or will be affected, the expected impact on business operations overall is not entirely and uniformly negative. For example, only 14% of the respondents are not confident in their ability to meet revenue or sales forecasts over the next 2 quarters.

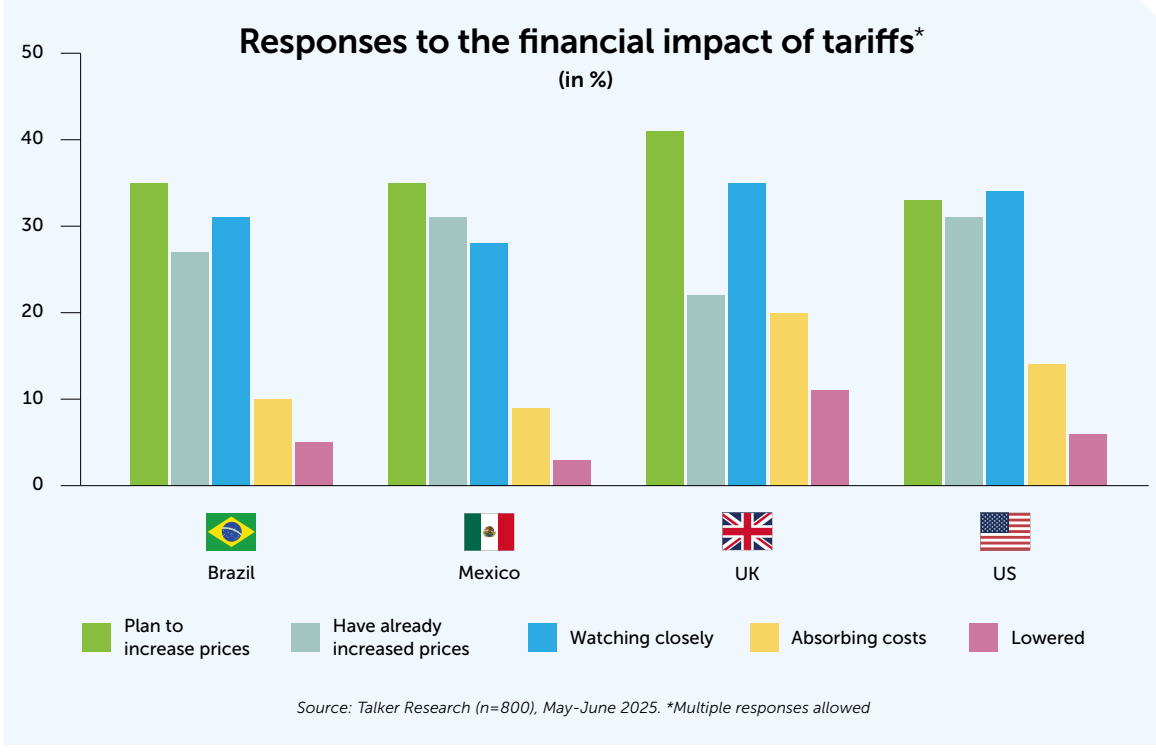
The Talker Research data also shows a possible regional shift in activities. More than 7 out of 10 (72%) respondents from Brazil, Mexico and the UK say they're exploring alternatives such as reinforcing their presence in local markets or shifting to intra-regional suppliers.

The same proportion of UK e-commerce leaders (70%) intend to source more from Europe to offset trade uncertainty, although this is less the case in Brazil and Mexico (over 40%).

Emerging markets hit hardest

While concerns are widespread, the nature of the effects felt by traders in the countries surveyed is quite different.

For example, the emerging markets of Mexico and Brazil record the most negative responses and least positive ones to the question: "Has the current tariff environment positively or negatively affected your business?" Both countries also have the highest share of respondents exploring alternative markets outside the US – 69% in Brazil and 67% in Mexico.



*Source: Talker Research (n=800), May-June 2025. *Multiple responses allowed*

Tariff pressures also hit these countries' currencies earlier this year, with the Mexican peso and the Brazilian real registering a continuous fall against the US dollar, according to the London Stock Exchange Group (LSEG). This, in turn, put pressure on the price of imported goods, contributing to negative business sentiment and price increases.

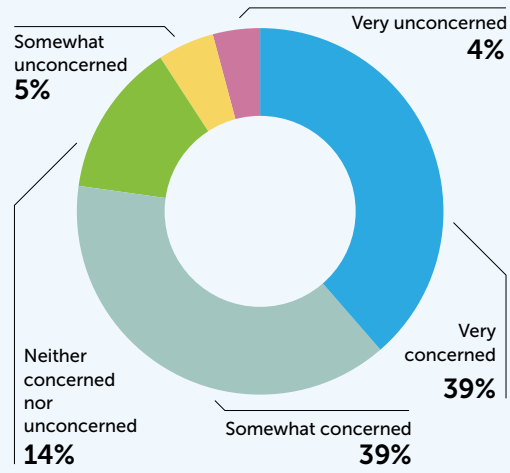
Finding the positives

Interestingly, a bigger portion of US and UK traders say the tariffs have already had a positive impact on their businesses (45% and 46% respectively). UK merchants are also less concerned than their Latin American counterparts about the long-term implications of the tariffs. The US has imposed tariffs of only 10% on some UK imports – a much lower rate compared to other countries.

US merchants have demonstrated that there are alternative options. Although more than half of their products are subject to tariffs, they intend to pass on an average 51% of the additional costs to customers.

They also report having diversified their product-sourcing strategies in the past 12 months, with this divided between Latin American (Mexico and Brazil) and Asian (Vietnam, India, Taiwan, Singapore and Indonesia) partners.

How concerned are e-commerce merchants about tariffs in the next 6–12 months?



Source: Talker Research (n=800), May-June 2025

On the other hand, based on the survey findings it appears that Mexican e-commerce merchants have a high reliance on the domestic market (61%) and that their product sourcing outside the country focuses almost entirely on Brazil and India. ◆

What does the pet industry think?

The general sentiment across the 4 countries surveyed is being seen in the pet industry too, both in terms of concern and price pressures.

An industry poll among 831 PETS International readers revealed that 72% expect US tariffs to impact their business in the coming months.

Among them, more than half (53%) show concern regarding possible loss of price competitiveness or margin pressures. Other major concerns are higher input or production costs (34%), and delays or volatility in the supply chain (13%). As a possible response to this, the majority of pet businesses (76%) plan to pass costs on to customers, with only a few intending to switch or diversify suppliers, or to scale back product ranges or volumes (12%).

From those who say they don't expect the tariffs to have any impact on their operations (28%), the vast majority (92%) attribute this to not directly doing business with affected markets, while others anticipate a diversification of suppliers and markets (8%).

And 58% of them are very confident that they'll remain protected against the impact of tariffs, with only a few showing a lack of confidence about maintaining a positive financial situation.



Josera GERMANY

Passion for what's inside: Josera's new look

The leading pet food manufacturer's new product look reflects premium quality and clearer orientation at point of sale.

Josera has given its dry dog food range a complete makeover. In line with its motto "Making something good even better", the brand is taking strategic steps following comprehensive international market research to better understand the evolving pet food industry, customer expectations and its own market positioning.

In 2025, the brand will relaunch its core product line – Josera Super Premium Dry Dog Food, which has remained unchanged since 2016.

This pivotal moment presents the perfect opportunity to not only modernize the product line but also to refresh the entire brand communication.

The mission

Packaging is the first point of contact with a brand, whether online or in physical retail. Today, it is no longer just about visual appeal, but also about clear orientation, fast information uptake and building trust. Josera's new packaging design was created with these needs in mind.

Josera set out to create packaging that resonates globally, appeals to target groups at the point of sale and revitalizes the brand's look – while proudly preserving its recognizable yellow identity rooted in tradition.

The team developed a clear, intuitive design that communicates premium quality more effectively than ever.

What's new?

All changes compliant with FEDIAF standards

- A design that creates more emotional resonance and global consistency
- 6 new dry food products, with 11 additional items already in development
- A segmentation system based on dog size for improved shelf orientation: Mini for small dogs, All Sizes for all breeds and Medi/Maxi for larger breeds
- Clearer communication of each product's unique selling points, prominently displayed on the packaging
- Josera High Protein, a product line developed specifically for dogs with higher energy needs and those requiring a greater meat content
- Josera Immune Plus, an added feature in all exclusive products
- A 3 kg pack size

What stays the same: The Quality Promise

No major recipe changes are planned – the flavor, digestibility and overall quality that customers know and trust will remain. All raw materials continue to be rigorously tested in Josera's own accredited laboratory.

Each product is developed collaboratively with vets and nutrition experts, then continuously evaluated. Finished products undergo strict quality checks before leaving the facility. This ensures that Josera's longstanding commitment to quality remains unchanged.

From announcement to first reveal

Josera started informing customers about upcoming changes in January 2025, with teaser notices on food bags, announcing that product names and packaging would be updated as part of the summer relaunch.

In May 2025, Josera unveiled the new design to a wider industry audience during Zoomark in Bologna, Italy. The packaging and other materials were showcased at the pet trade fair and received an overwhelmingly positive response from the attending industry professionals.

A visible success

Josera's new look is designed to boost shelf visibility and make it easier to choose the right product, both in-store and online.

The redesign delivers on several fronts. It makes purchasing decisions easier with a clearer layout. It also reinforces brand identity and highlights key values such as quality, responsibility and digestibility. In short, the packaging now fully reflects the premium quality inside.

The response has been extremely positive from both retailers and end consumers. The Josera team has achieved strong results, showing how cross-functional collaboration, customer insights and strategic thinking can drive real impact.

Josera takes the next step

A major milestone awaits in 2025: Josera is opening its newest pet food facility in Nowy Tomyśl, Poland – one of the largest and most advanced factories of its kind in Europe.

Located beside an agricultural production site that has been operating for over 25 years, the new facility represents a significant step forward in Josera's international expansion.

This bold move helps Josera to serve Central and Eastern European markets more efficiently while maintaining the brand's high standards for quality pet food.

Drawing on the expertise developed at its headquarters in Kleinheubach, Germany, Josera has successfully transferred all key processes, production decisions and quality standards to the new site.

Josera's premium promise remains unchanged, in every bowl, worldwide. ◆

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Data snapshot: changes in pet ownership across Europe

We take a comprehensive look at the trends emerging in Italy, France, Germany and the Netherlands in the years since the COVID pandemic.



David Palacios
Editor-in-Chief
GlobalPETS

While France and Italy continue to show population growth in cats and small mammals, Germany and the Netherlands are seeing signs of an overall downturn. Industry data provides a detailed snapshot of how pet populations are shifting across these European countries.

General trends

Data from the Italian pet industry association Assalco shows a stabilization in the country's pet population, which remained steady at 65 million in 2024 – while the human population has decreased by 1.9 million to 59 million in the past decade.

In France, the pet population reached 75.1 million in 2024, unchanged from 2023. Compared with 2022, however, this represents an increase of 1.1 million. According to FACCO, the French federation of pet food manufacturers, the number of pets in France has more than doubled since 1976.

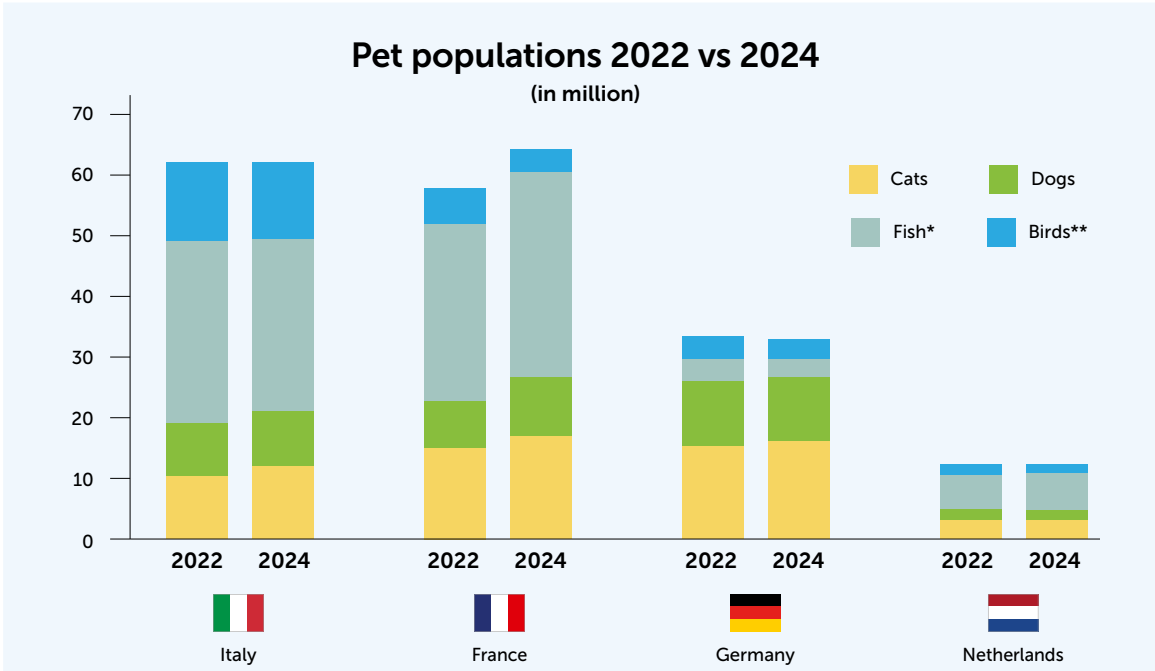
German households owned 33.9 million pets in 2024, down from 34.3 million in 2023. The share of households with pets also declined slightly, from 45% in 2023 to 44% in 2024, according to ZZF, the German pet trade and industry association, and the Industrial Association of Pet Care Producers (IVH).

In the Netherlands, the pet population is estimated at 18.5 million, representing 44% of households. In 2023, the number was higher, at 22.4 million. Data from the Dutch pet trade association Dibevo and the Dutch pet food manufacturers association NVG, indicates that Dutch households now own fewer dogs and cats compared with 2021.

Cats: rising numbers in Italy

One of the sharpest increases in pet populations has occurred in Italy, driven by a surge in cats. The feline population there rose by 1.7 million in a single year, climbing from 10.2 million in 2022 and 2023 to 11.9 million in 2024 – an increase of 16.7%. Overall, the cat population in Italy has grown by nearly 2 million since 2021 (18%), making cats the country's fastest-growing pet category.

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*Source: Assalco, FACCO, ZZF-IVH, Dibevo | * Includes aquaria and ornamental fish | ** Includes songbirds*

In Germany, growth was more modest. The number of cats increased by 200,000 between 2023 and 2024, from 15.7 million to 15.9 million. ZZF and IVH research shows that last year a quarter of German households owned a cat. Almost 4 in 10 (38%) of German cat owners had 2 or more felines in 2024, a drop from 42% in 2023.

France also recorded an uptick in its cat population. The number of cats rose by 100,000 year on year, reaching 16.7 million in 2024. By contrast, the number of cats in the Netherlands remained stable, with a population of 3 million from 2022 to 2024, and 23% of households owning one or more cats. Compared to 2021, when there were 3.2 million cats, this represents a 6.3% decline over 3 years.

Dogs: numbers down in the Netherlands

In Italy, the dog population increased from 8.8 million in 2023 to 9 million in 2024, a rise of 2.3%. Assalco data shows that the number of dogs has grown by 270,000 over the past 4 years, after a period of stabilization during the tailend of the pandemic in 2021 and 2022. Between 2021 and 2024, dog ownership rose by just over 3%.

In France, the dog population reached 9.7 million in 2024 – 200,000 more than in the previous year. Germany reported no change year on year, with 10.5 million dogs in 2024, making them the country's second most popular pet. Around 21% of German households own a dog.

In the Netherlands, the dog population stood at 1.7 million in 2024, down slightly from 1.8 million in 2023. Compared with 2021, this represents a decline of 5.6% over 3 years, with the biggest decline since 2023.

Fish: a popular choice in France

Following the trend of previous years, fish remained the most popular pets in France in 2024, with a population of 33.7 million. This marks a sharp increase from 29.8 million in 2023 and 29.1 million in 2022. In Italy, fish are also the most common pets, but the stable trend seen since 2021 shifted in 2024. The population fell from 29.9 million in 2023 to 28.1 million in 2024.

The cat population in Italy has grown by nearly 2 million since 2021 (18%), making cats the country's fastest-growing pet category.

In Germany, the number of ornamental fish and terrarium pets has declined. Their population was estimated at 1.1 million in 2024, down by 200,000 from 2023. The aquarium fish population also decreased, from 2.2 million in 2023 to 2 million in 2024.

In the Netherlands, 4% of the households kept around 6 million aquarium fish in 2024. This was 700,000 fewer than in the previous year.

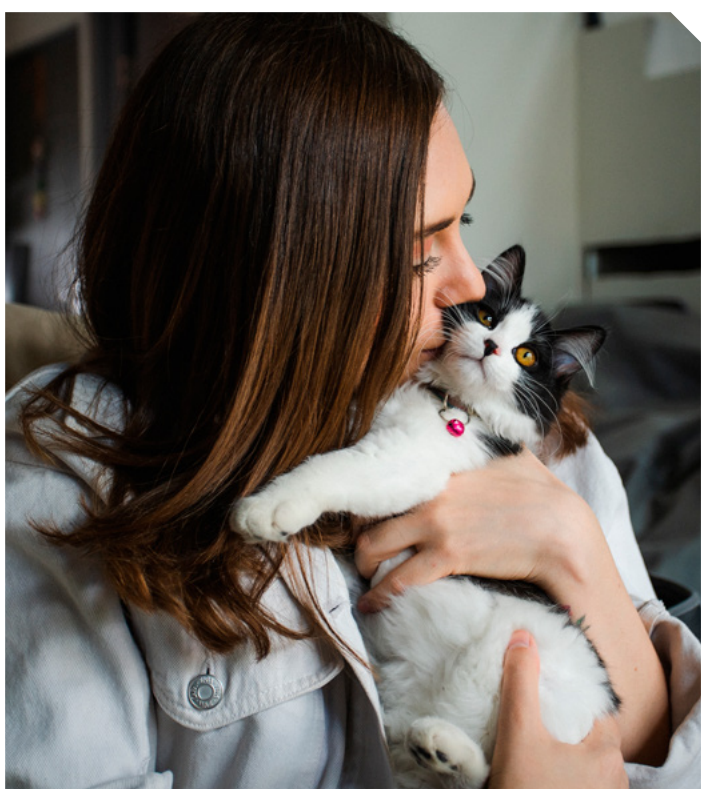
Birds: less interest in Germany and Italy

In Italy, the pet bird population declined slightly from 12.9 million in 2023 to 12.7 million in 2024. Over the period 2021-2024, this represents a decrease of 1.4%. Germany also recorded a drop in pet bird numbers, from 3.5 million in 2023 to 3.2 million in 2024, with birds found in around 3% of German households.

In France, the bird population remained stable at 3.6 million in 2024. The Netherlands, by contrast, saw a modest increase. Around 1.5 million songbirds were kept as pets in 2024, 100,000 more than the year before. However, industry data indicates that the population has declined by 6.3% since 2021.

Small mammals in France and Germany

The number of small mammals rose sharply from 3.7 million in 2023 to 4.7 million in 2024 in France. In Germany, small pets such as rabbits, guinea pigs, hamsters and mice totaled 4.3 million in 2024, representing 5% of households. This was slightly down from 4.6 million in 2023. Industry data also shows that 1.4% of Germans kept farm animals such as chickens or quails at home in 2024. ◆





An end to doggy domination?

The growth of cat ownership is outpacing that of dogs in many countries, including the US. We dive into the market data to analyze the implications of this shift for the future of the pet industry.



Dan O'Connor
Contributor
PETS International

The US is just one example of a country where the popularity of dogs has long been a driver of economic growth for the nation's pet industry. However, recent trends suggest that 'man's best friend' is losing ground to feline rivals. While pet dogs still far outnumber pet cats, the gap is shrinking.

What the data says

Analysis by Packaged Facts found that dog ownership rates slipped from 42% to 38% of US households between 2018 and 2024, while cat ownership rates ticked up slightly, from 23% to 24%.

Data from Shelter Animals Count suggests a similar trend. The US non-profit organization concluded that in 2024, nationwide dog adoptions decreased by 1% compared to 2023, and by 13% compared to 2019. Conversely, cat adoptions grew by 2% from 2023 and surpassed 2019 levels by 3%.

Insight into consumer spending

Without pets, there is no pet industry, and without dogs, that industry would be significantly smaller. Pet owners generally spend much more money on goods and services for dogs than for cats.

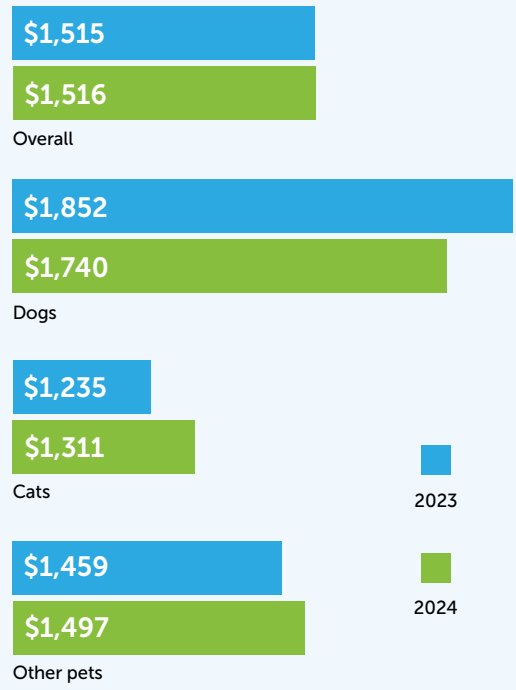
Excluding adoption and purchase costs, pet parents in the US spent on average $1,700 (€1,618) in the last two years. The amount for cat owners was lower at $1,350 (€1,285), according to the American Veterinary Medical Association (AVMA).

Cause for concern?

While it's unclear whether the market penetration growth of cats will continue to outpace that of dogs in the long term, some industry officials have publicly voiced concern. Central Garden & Pet CEO Niko Lahanas called the trend a "headwind". "Dog is really the category that drives everything; it drives the footsteps into the stores, it drives consumer engagement," he says.

Pete Scott, CEO and President of the American Pet Products Association (APPA), shares his apprehension that many sectors of the industry could be impacted by a shift away from dogs. "Cats are cheaper," he states. "They don't require the grooming, the boarding, some of the veterinary visits. They don't need as many toys." That could mean less spending if the trend persists.

Yearly spend of US pet owners



Source: 2024 AVMA Pet Ownership Sourcebook

At pet retailer Pet Supplies Plus, they acknowledge that customers spend significantly more on their dogs than their cats. Therefore, they are keeping an eye on the trend. However, because the chain already has a range of options for cats, it is not noticeably disrupting their business. "It's not really causing too much concern at this point," comments Marketing Manager Monica Lemming in an interview with PETS International.

Will the trend continue?

The shift towards cat ownership could be a temporary response to inflation. More consumers may be adopting cats because they want a pet, but don't have the money to care adequately for a dog.

"Is it temporary? I don't know," admits APPA's Scott. But according to him, even a short-term shift could have a lasting effect on the industry. Since pet ownership is a long-term commitment, it may take years before the full impact becomes clear.

Generational wealth gap

While the millennial generation is still dominating sales, Gen Z (people born between 1997 and 2012) is

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a growing demographic for the pet industry. Generally, Gen Z consumers are considered to be less well-off than other groups, due to student loan debts and the prohibitively high cost of buying a home. Some of that is part and parcel of being young, but such factors do not offer encouraging prospects for the generation's ability to build wealth in the short to medium term.

According to recent research by American consumer credit reporting agency TransUnion, 22- to 24-year-olds in the Gen Z cohort are making less money and have more debt than millennials did at the same age (10 years ago).

The study found that 20-somethings today are taking home around $45,500 (€39,200), while millennials at their age were earning $51,852 (€44,670) when adjusting for inflation. Debt is also taking a bigger bite out of Gen Z's earnings than the generation before them. The debt-to-income ratio for Gen Z is 16.05%, compared to 11.76% for the millennials a decade ago. This leaves Gen Z consumers with little over $40,000 (€34,460) of their annual salary left after their mortgage, student loans and other debts have been paid, while millennials had around $47,000 (€40,490) when they were 22 to 24 years old.

Impact of affordable choices

All this could be putting pressure on young consumers' pet-related purchases. "Regardless of those being conscious of spending, [are the facts of] generational income and where they stand," Lorraine Shirley from Clarkston Consulting tells PETS International.

Shirley highlights the potential impact of the increased difficulty of buying a house. "Consumers are going to have to make a choice... being able to manage maybe a more affordable pet while still getting the interaction that they're seeking," she concludes.

If Gen Z consumers do prove to be adopting dogs at a lower rate and driving strong growth in smaller animals, the industry effects of this shift in consumer behavior are unlikely to be limited to the short term. ◆





Solving odor at the source

How can pet food manufacturers address the rising challenge of odor control?



Jowan van den Berg
Odor Specialist
Aerox BV
aerox.nl

Growing urban populations and increasingly strict environmental regulations have placed air quality high on the agenda for industrial manufacturers.

Within the pet food industry, odor management is becoming an essential operational consideration. Odor emissions from production processes such as extrusion, drying and cooling can lead to complaints from local communities, pose reputational risks and result in regulatory action. The production of dry pet food releases volatile organic compounds, particularly during high-temperature processes. These odors are typically emitted through factory exhaust systems and can impact surrounding areas.

Traditional abatement methods, such as chemical scrubbers or water-based filters, often require significant energy, ongoing maintenance or the use of chemicals, leading to additional operational costs and environmental concerns.

Cold plasma injection as an innovative solution

A relatively recent and sustainable approach is the use of cold plasma technology for odor treatment. Cold plasma is an ionized gas, known as the fourth state of matter alongside solid, liquid and gas.

In cold plasma modules, ambient air is converted into a reactive mixture rich in active oxygen species. When these reactive particles encounter odorous compounds in the process air, a rapid oxidation reaction takes place, effectively breaking down the odor molecules.

The major advantage of this technology is that it only uses electricity and does not require chemicals or water. There is no secondary waste stream, making it an environmentally friendly technology with low energy consumption. This makes cold plasma a sustainable and practical solution for industrial odor control.

The Aerox-Injector in action

One example of this technology in practice is the Aerox-Injector, an odor control system installed directly on industrial exhausts. The design ensures that the plasma modules remain clean, as there is no direct contact between the process air and the plasma field. This reduces maintenance requirements and extends the lifespan of the equipment.

With the capacity to treat up to 250,000 m^3 of air per hour, the system is suitable for large-scale production lines. Currently, more than 350 installations worldwide rely on this proven technology.

A sustainable investment

For manufacturers in the pet food industry, reducing odor emissions is not only a regulatory necessity but also an opportunity to invest in future-proof, sustainable solutions.

Cold plasma injection technology offers an effective, low-impact alternative to traditional odor abatement methods, providing benefits for both operational efficiency and the wider environment. ◆



Palatants in pet pharma and supplements: elevating health through taste

With health products only effective when consumed, taste can be just as important as function. How can manufacturers ensure pets accept what's good for them?



Aman Paul
Head of Customer Technical Insights Europe
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Pets often have unique health needs, which is where pet pharmaceuticals and supplements come in. These products can provide essential nutrients, vitamins, minerals and veterinary actives that promote overall wellbeing or target issues such as joint function, digestion, immune health or parasite control.

However, administering these beneficial products successfully can be challenging. Many active ingredients like parasite control actives, glucosamine, chondroitin sulfate and various vitamins or minerals have a bitter or off-putting taste.

Dogs have around 15 bitter taste receptors, and cats about 12, making them highly sensitive to bitterness. If a pet has a negative experience with a supplement or medication, they may become increasingly reluctant to accept it again. Even the most advanced formulations are only effective if the pet willingly consumes them.

Secret ingredient

Palatants are a potential solution to this challenge. These aroma and taste enhancers are specifically developed to make pet products more appealing. Think of them as the secret ingredient. By adding meaty, savory or fishy flavors, they help mask unpleasant notes and make supplements more attractive. Because pets rely heavily on their sense of smell, a more appealing aroma can encourage interest and consumption. A product that smells and tastes good could even become a welcome part of a pet's routine.

Palatants are typically made from enzymatically hydrolyzed and thermally processed animal proteins such as chicken, pork, beef or fish. In response to market demands and dietary needs, manufacturers are also exploring non-animal protein-based palatants.

In pharmaceutical applications, initial bitterness is often addressed with taste-masking agents, though these are sometimes limited by cost and formulation constraints. Once the bitterness is softened, palatants are added to enhance overall palatability, helping transform even bitter medications into products pets are more likely to consume.

Expert support for manufacturers

AFB International recognizes that pet supplements are important for addressing nutritional gaps and supporting long-term health.

With expertise in the development of high-quality palatants, AFB supports manufacturers in creating supplements and pharmaceuticals that pets are more likely to accept. Improved palatability contributes to better compliance, more consistent intake and improved health outcomes. ◆



Are dogs becoming fussier eaters?

As knowledge of what makes dog food palatable grows deeper, and greater numbers of additions are made to pet diets to make them more appealing, researchers are asking if this is encouraging canine food selectivity.



Laura Ward
Pet Nutritionist
Rewarding Pet Nutrition

Palatability has been a key focus across the pet food industry as the sector develops, and it'd be fair to say that the palatability of modern dog foods is at an all-time high. With a growing market of tempting additions to boost appeal, and claims such as 'suitable for fussy eaters' now widespread, the question is posed: when did dogs get so pernickety?

Dog food evolution

In 60 years, the dog food industry has evolved enormously. From 1970 – when dog biscuits first appeared in the UK – to today where there is not only a vast array of formats of complete and balanced dog food available but a wide variety of complementary products, the expansion has been huge.

Toppers are a key example, designed to enhance pet food through taste, texture and nutrition. Freeze-dried toppers first emerged in the US in early 2010s. By 2018, toppers were viewed as a massive growth category, and by 2020 UK brands were entering this category.

Toppers incorporating functional claims have emerged, and now toppers are firmly established as a pet food market segment, chiming with trends of humanization and diet customization.

Advances in palatability science

By its definition, palatability is related to how readily a food is accepted and measured in terms of its attractiveness and consumption. It is an essential element of dog food development, as an owner's decision to feed, or to continue feeding a particular product, is heavily influenced by their dog's perceived enjoyment of it.

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Traditionally, palatability studies have used one-bowl tests to study acceptance and two-bowl tests to judge preference. However, new methods of assessing a pet's enjoyment of food are now available. These include facial expression coding systems, behavior analysis, e-nose and e-tongue analysis to identify chemical composition, and the use of canine olfactometers to supplement understanding of two-bowl preference testing, which works by isolating aroma from other cues.

A review by researchers at the University of Arkansas reported that dogs decide their food choice during the step of aroma isolation, showing the huge importance of food smell in dog palatability. False bottom bowls can provide separation of aroma and other food characteristics in palatability testing. Cognitive palatability assessment protocol – a method where dogs are trained to connect foods with non-food objects – is ill-suited for widespread use due to training time required, but can be a useful tool in palatability assessment.

Human influence

A dog's role within households has shifted over generations, from 'just a dog' to 'one of the family'. Owner-dog bonds now most closely resemble parent-child relationships. Dog owner perceptions, priorities and purchasing of dog foods are now key aspects of feeding behavior, with owners' views regarding ingredients, nutrition and format directly impacting the foods offered to dogs.

The humanization trends observed throughout the pet food industry have led to changes to the ingredients and characteristics of pet food products so that they more closely resemble human foods.

The evolution of dogs alongside humans means that they display human-like social skills and respond to social cues, allowing them greater synchrony with humans. Studies consistently show that human preferences affect dogs' choices. Research from the University of Milan published in 2008 demonstrated that dogs' innate preferences for greater food quantities were overridden after seeing an obvious preference by their owner for the smaller food quantity option.

Owner bias can therefore predetermine palatability outcomes in dog food, with owner preferences and relationships with food influencing acceptance of food and feeding behavior in dogs.

Palatability testing where positive human cues, including eye contact and petting, were given prior to food being offered led to greater food consumption by dogs than when no social cues were given. Dogs therefore make choices influenced by food presentation by their owner, rather than on food characteristics alone.

Are dogs getting more picky?

Dog owner surveys reveal interesting insights into feeding behavior and food selectivity in dogs. A 2023 survey commissioned by pet food company Butternut Box found 37% of owners describe their dog as a "fussy eater", with 10% of dogs "consistently refusing to eat their food".

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Despite owners' desires for dog foods of comparable quality to their own being met, a considerable proportion of dog parents regularly struggle to entice their pets to eat.

A study by the University of Cambridge into links between dog obesity risk and appetite found many owners added taste-enhancing foods to their dogs' regular diet. Owner-stated reasonings for this varied from dogs refusing kibble without additional food toppers, to simply using up leftovers.

This owner behavior occurred across dogs with different food motivation, so the action of adding toppers to dog food is not solely to encourage appetite.

Within another survey of 2,000 dog owners by OnePoll for US dog food brand Jinx however, 49% admitted that they "always" or "often" struggle to get their dog to eat meals, with 48% reporting that they need to add things to the meal to encourage their dog to eat.

Survey data also reports 54% of dog owners consider their dogs "picky eaters". 17% report that their dog "turns their nose up if the food isn't up to scratch", and 30% of those dogs are reported as being more interested in their human's food. On average, owners have tried 8 flavor or brand varieties before finding a food which works for their dog, and 28% of owners have at least 10 bags of unused dog food at home from searching for an option that works well for their pet.

Need for further research

We know more about dog food palatability than ever. With a focus on constant improvement and innovation, dog foods are achieving higher quality nutrition.

However, despite owners' desires for dog foods of comparable quality to their own being met, a considerable proportion of dog parents regularly struggle to entice their pets to eat.

Are dogs learning picky eating tendencies through increasingly appealing options being offered? Future research exploring behavior around fussy eating, social cues and dog owner influences would provide key industry insights. Owner perceptions of food and associated feeding need to be accounted for, as optimizing positive social cues to dogs could improve acceptance.

Further understanding would benefit dog food palatability and ensure dog foods are developed to best suit feeding behaviors. ◆



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Traditionally cooked from chicken, pork, lamb, or beef bones - and available as liquid paste and powder.

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Essentia
Protein Solutions



Image: Jakob Lassen, veterinarian and Business Manager at Essentia Protein Solutions, supports customers in developing effective formulation strategies.

Is bone broth a solution to the palatability challenge?

Picky eaters, declining appetites: getting pets to eat is not always easy. Bone broth may offer a natural answer.



Irene Plats
Global Marketing & Sustainability Director
Essentia Protein Solutions
essentiaproteins.com

PetPremio™ Bone Broth is a clean label ingredient range that combines documented palatability with functionality. Made by cooking pork, chicken, lamb or beef bones in water, it delivers natural collagen and rich, meaty flavor. Once concentrated and dried into fine powder, it's easy to handle and apply across various pet food formats. Most versions come as liquid pastes for inclusion into applications like wet pet food.

Jakob Lassen, veterinarian and Business Manager at Essentia Protein Solutions, explains the company's ambition behind its bone broth range for pets: "With their strong palatability, our bone broths support consistent intake. Whether coated on kibbles, mixed into cold-pressed options, added to treats and wet food, or used as a topper, they enhance appetite and make meals more appealing for both dogs and cats. Their rich aroma and taste are especially useful for pets with low food motivation or special dietary needs."

Preference for bone broth-coated kibbles

In a recent A/B test conducted by Volker Coester GmbH, researchers evaluated the impact of PetPremio Pork Bone Broth on an already highly palatable premium pet food product. 40 dogs and 40 cats were offered two bowls of kibbles – one with bone broth coating, one without. Results showed a slight preference for the coated kibbles: dogs favored them by 8% on day 1 and 13% on day 2; cats by 3% on day 1 and 18% on day 2. Intake was also higher from the bone broth-coated bowls, suggesting that familiarity reinforces preference.

Boosts palatability and wellness

Beyond palatability, bone broth delivers health benefits that resonate strongly with today's pet owners. The high collagen content of PetPremio Bone Broth is recognized for contributing to joint health and mobility, supporting active lifestyles and aging pets alike. Collagen is also known for promoting a healthy digestive system, while contributing to healthy skin and coat.

With the rising demand for natural and functional ingredients, Essentia's PetPremio Bone Broth range provides an effective solution to elevate both the nutritional and sensory profile of pet food. These human-grade ingredients support premium claims and clean label positioning, without compromising ease of formulation.

For pet food brands seeking to combine meaty appeal with meaningful benefits, PetPremio Bone Broth offers a versatile solution – convenient to use, easy to declare, and well aligned with what pet owners are seeking. ◆

Weighing up the advantages of utilizing lentil pasta byproduct in pet food



Leveraging increased consumer demand for pasta made from lentils by using its byproducts in pet food could have benefits for both dog nutrition and the planet.



Livio Penazzi
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Department of Veterinary Sciences, University of Turin



Aulus Carciofi
Universidade Estadual Paulista, São Paulo

Food demand will rise greatly during the coming years, challenging the quality of life of both people and their pets. Recent research has found that the presence of lentil byproducts in pet food may both promote intestinal health and act as prebiotics in dogs, while also being environmentally sound.

Planet, people and profit

It is undeniable nowadays that the world is changing from a climatic and demographic point of view. Alternative raw materials in pet food, such as byproducts from the human food industry, can increase the provision and digestibility of different nutrients while at the same time offering enhanced economic and environmental sustainability.

A nutritional approach is considered sustainable if it is in accordance with the '3 P' dimensions: planet, people and profit. These changes, alongside the increased food quality awareness of pet owners, are leading pet food manufacturers to introduce products with new sources of non-structural carbohydrates (NSC) and proteins.

Recently, legumes have been rediscovered by the pet food industry as new or alternative sources of both carbohydrates and proteins. The marketing focus on these ingredients has been promoted by manufacturers to create an option with greater appeal than more traditional components of pet food diets, such as cereals.

In fact, grain-free diets – based on legumes and tubers as main carbohydrate sources – are already largely present in the pet food market. The production of lentil pasta in Italy has been increasing steadily due to the rise of celiac disease in humans; as a result, the byproduct of this human food (discarded due to discoloration

The inclusion of lentil pasta byproduct in dog food, especially in moderate amounts, was found to be appropriate and potentially beneficial as part of a balanced diet.

or shape) has grown in quantity and has received the attention of the pet food industry as a possible alternative ingredient for dog food.

Lentil pasta byproducts as pet nutrition

In our recent study, published in *Frontiers* in 2024, lentil pasta byproduct (LP) was evaluated for both the implications involving the extrusion process as well as digestibility, palatability and physiological parameters in dogs.

The digestibility parameters of dry complete food based on LP showed that this ingredient retains high bioavailability of nutrients. In addition, lentils can positively influence the post-prandial glycemic and insulinemic response, lowering the curve peaks compared to rice, possibly affecting the metabolic pathways of the animal. Nonetheless, the palatability of the ration seemed to be enhanced by the addition of LP, of which its organoleptic properties appeared to be appreciated by dogs more than in the case of rice.

However, extrusion processing parameters need to be carefully evaluated due to the reduced level of starch and increased level of fiber and protein of legume-based diets compared with cereal-based ones. In fact, the resistance to mass flow can affect kibble formation and hardness, altering the final product characteristics.

Effects of high fiber content

The research also examined how well dogs digest nutrients when their diet includes either rice or LP. The study found that when rice was only partially replaced with LP, the digestibility of dry matter, organic matter and crude protein improved. However, when rice was completely replaced with LP, nutrient digestibility decreased. Similar results were observed in other studies using legumes such as peas, chickpeas and fava beans, showing better digestion with partial substitution compared with full replacement.

This decline in digestibility may be due to the higher fiber content in legumes, which can affect how well dogs absorb nutrients. Despite this, the inclusion of LP in dog food, especially in moderate amounts, was found to be appropriate and potentially beneficial as part of a balanced diet.

Bacteria in dog's large intestine help break down dietary fiber through fermentation. This process produces substances including short-chain fatty acids (SCFAs), such as acetate, propionate and butyrate, which support gut health. In this study, adding higher amounts of LP to dog food increased fiber intake, which led to greater fermentation and higher levels of these beneficial acids in the feces. Importantly, LP could offer a more affordable alternative to common prebiotic supplements like FOS (fructo-oligosaccharides) and inulin.

Facing future food challenges

The potentially increasing burden associated with feeding pets needs to be recognized as part of future food system challenges in the light of the magnitude of the food waste crisis. For this reason, the revalorization of food byproduct should be prioritized. In particular, the concept of upcycling, i.e. using still nutritionally valuable but discarded byproducts, has stirred research interests in various fields, including marketing, even though the concept is already quite established in the pet food industry.

Opposing this idea is the so-called 'premiumization' trend in pet food, i.e. the use of higher cost ingredients which, in certain cases, are directly taken from what would be considered suitable for human consumption. The current role of researchers, as well as pet food manufacturers, focuses on mitigation options to increase sustainability while enhancing economic growth with appropriate marketing.

A current trend to achieve an improved sustainable use of agriculture while increasing planetary health is to facilitate the adoption of human plant-based diets. From an environmental standpoint, plant-based diets require lower energy, land and water usage compared with meat-based diets. When combined with meat-based ingredients, plant proteins can overcome their deficiencies and form part of dogs' diet – although for cats this can be a greater challenge due to their carnivorous nature.

The main opportunity to increase the sustainability of our pets' diets is to increase knowledge about new ingredients and correctly target consumer choices through scientific evidence to ensure pet food safety. ◆



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Ink the future of recycling with Coveris

Coveris is setting a new standard in sustainable pet food packaging with the introduction of polyurethane (PU) ink technology across its recyclable MonoFlex range.

As traditional nitrocellulose (NC) inks face increasing restrictions, including recent recyclability limitations in Germany and across the EU, PU inks provide a fully compatible solution for polyethylene recycling.

Certified by RecyClass and fully PFAS-free, PU inks support compliance with evolving legislation and circularity goals, without compromising shelf appeal or packaging integrity. Ideal for pre-made bags, FFS films and pouches, this innovation brings Coveris' No Waste vision to life by advancing sustainable packaging for pets.

Visit Coveris at PATS Birmingham (28-30 September, booth E48) to explore PU inks for recyclable pet food packaging.

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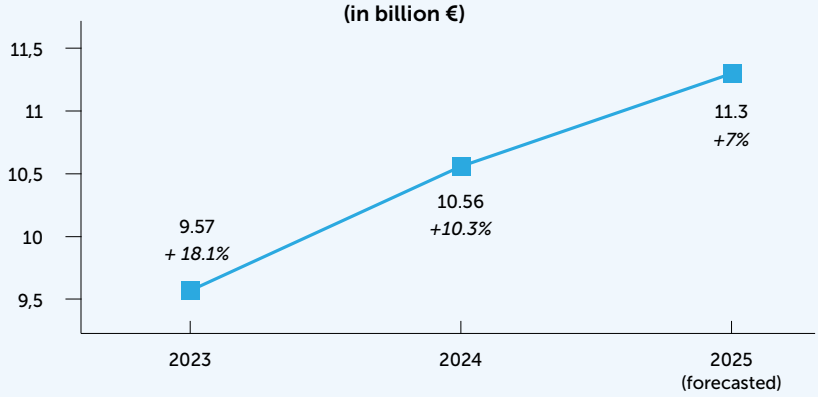
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Eastern Europe: the pet market in numbers

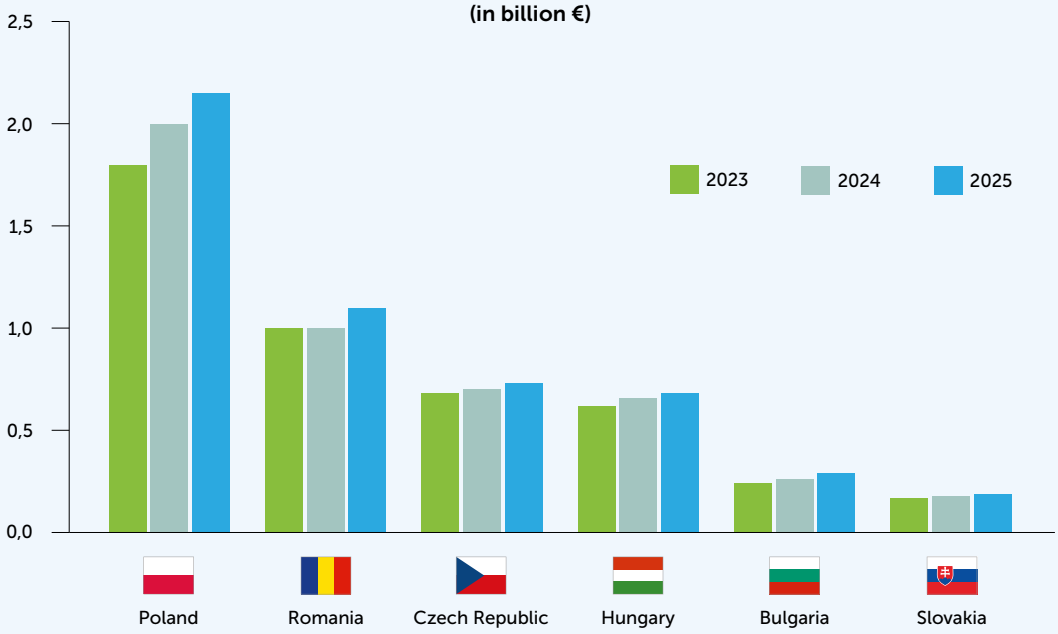
Regional pet care market size

(in billion €)



Pet care market by country

(in billion €)



Source: Euromonitor International



Regional report: Central and Eastern Europe

More alike than different

A look at pet care trends across Poland, Hungary, the Czech Republic and Slovakia – and how they stand in comparison with Western Europe.



Fabio Turco
Contributor
PETS International

In 1989, as many countries in this region regained independence and began to align with Western Europe, a new era began for various market sectors. The pet industry was one of those that has since experienced significant growth, driven by increasing pet ownership, e-commerce adoption and economic factors.

Poland: constantly growing market

Thanks to its size, Poland stands out as a dominant player in the Central and Eastern European pet industry, mirroring trends in Western Europe. The market has seen substantial expansion, fueled by high pet ownership rates and a thriving export sector. According to statistical data from European pet food industry association FEDIAF, the Polish pet food market is currently valued at approximately zł4.9 billion (€1.15B/$1.35B), with projections for annual growth of between 5%-7%.

"It's a constantly growing market," says Maciej Przeździak, General Secretary of the Polish Pet Food Manufacturers' Association (Polkarma). This growth is supported by a high level of household pet ownership, with 49% owning at least one dog and 40% owning cats. The surge in e-commerce has been a key driver too, with more than 20% of pet care products sold online, according to Euromonitor data, making Poland a regional leader in digital sales.

▶ SEE NEXT PAGE

Private label products in the pet category are gaining traction, with a 3.7% increase in volume and a 5.1% rise in market share, as consumers seek affordable options amid inflation. Export is also important for the Polish market, with local pet food manufacturers selling their products throughout the EU and to 63 other countries.

Local production facilities

"Thanks to the availability of raw materials and workers, relatively low production costs and our geographical location, many companies have their production facilities in Poland. We also have indications that new companies want to open their factories here, or that work has already begun on them," says Przeździak.

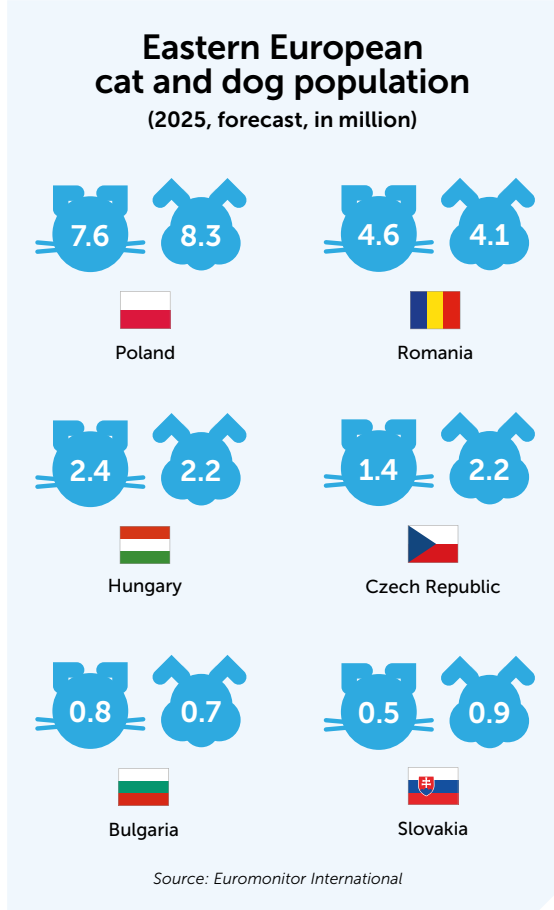
Polkarma's General Secretary also points out that, according to an audit conducted last year by the European Commission, Poland produces about 10% of the entire European pet food output. The market is expected to reach €2.46 billion ($2.89B) by the end of the year, according to data from Mordor Intelligence, with a 7% annual growth rate, driven by demand for premium and sustainable products.

Online sales are also booming in the market. The turning point was the pandemic, according to Marcin Kukla, CEO of Zoona.pl, an online pet retailer based in the southern city of Katowice. The company was founded in 2015 and has managed to establish itself as a benchmark in the sector. "Since COVID, the number of people buying products online has grown much faster than ever before," he explains.

Online marketplaces move up

The presence of major online marketplaces in the country is also impacting the retail landscape. Allegro – a Polish-based e-commerce platform that is the biggest in the country – has been operating in the country since 1999, while Amazon entered the market in more recent years. "Marketplaces are good for the buyers, but bad for the sellers," Kukla explains.

"For the shopping platform, it really doesn't matter who sells the product. Most important is having the lowest price and trying to lure the client there, so that the marketplace itself earns its margin from each sale," he says.



According to Kukla, the emergence of Chinese players such as Temu, AliExpress and Alibaba won't substantially change things because Polish pet owners are looking for products from reliable sources, especially when it comes to their pet's health. Amazon, however, could take advantage of a dispute that has arisen between Allegro and InPost, leading companies in the locker box market, to gain a larger market share.

Hungary: high pet adoption

The second most important market in Central and Eastern Europe is Hungary, where 49% of the households own a dog – one of the highest figures in Europe and the highest in the region – while 35% own a cat. This adoption rate has propelled the pet industry forward, making it a regional growth driver. A notable trend is the shift toward online purchasing, with Hungarian pet owners increasingly buying food and accessories via e-platforms.

Almost half of Hungarian households own a dog, one of the highest figures in Europe and the highest in the region.

This year, pet food market revenue is projected to reach ft35.12 billion (€88.72M/$103.62M), with an expected annual growth rate of 4.05% through 2030, according to Statista. The market benefits from increased spending on veterinary services and wellness items, though findings from a survey conducted by financial services company Cofidis show that economic pressures have led to a 33% rise in pet care costs over the past 5 years.

Grooming and boarding services

According to Péter Gárdos, CEO and founder of Hungarian pet care company Dogmopolite, pets have started to become integral members of the family. As elsewhere, this is reflected in a shift towards premiumization, with owners purchasing items like clothing and treats, which contributes to projected market growth in segments such as pet grooming and accessories.

"There are more and more single households, where pets play an increasingly important role. They are being given more attention and affection, and people are spending more money on them. It seems to be a business which is pretty recession-resistant," he says.

Dogmopolite's experience is indicative of the dynamism of the Hungarian market and its potential for growth. Gárdos explains how the company started: "We had just one employee, who provided dog walking and daycare services. After a while, we started to offer dog boarding services in an apartment in my grandmother's villa in the Buda hills."

In 2012, having outgrown this location and a subsequent one, Dogmopolite opened its first large boarding facility in Budapest, the biggest of its kind at the time. Its first and second grooming locations followed, as well as another boarding facility. "Today, we operate 4 boarding and daycare facilities in and around Budapest, and in Debrecen in eastern Hungary, as well as 4 dog grooming salons, a veterinary clinic and a web shop."

A distributor's perspective

Another perspective comes from Péter Tamási, CEO of PetPartners Hungary, one of the country's largest pet product distributors. "For many years, the Central and Eastern European region was the main growth driver in Europe. The pet market in these countries was growing a lot more than in Western European countries. I think it's true to say that Hungary was also a driving force in the growth of the European pet space."

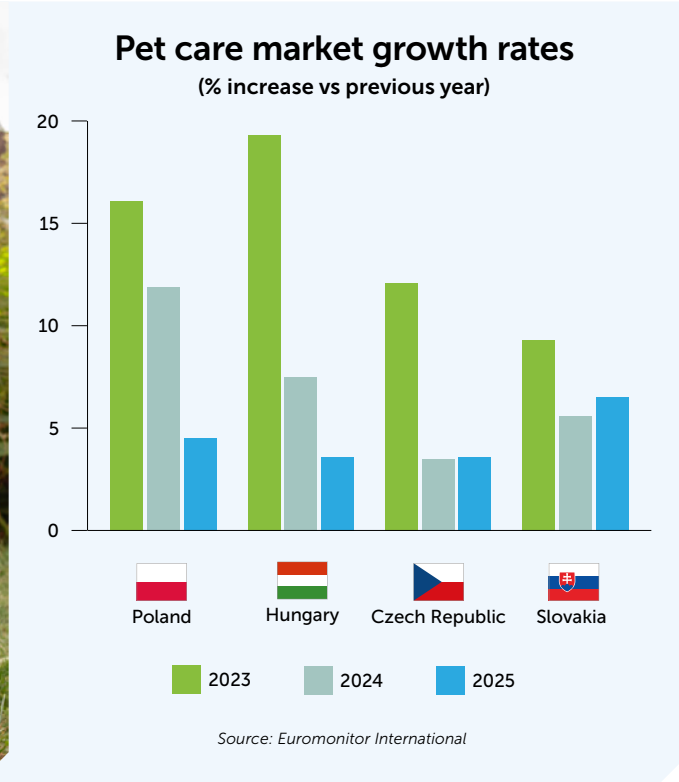
During COVID, there was double-digit growth in the whole Hungarian pet market. But this started to slow down when the war in Ukraine started. "Right now, there's not much growth in the market. In 2022-2023, the general inflation rate in Hungary was one of the highest in Europe, at around 25%. So it also had an effect on the pet food market, where the inflation rate was between 40% and 50%."

According to Tamási, that had an impact on premiumization. He notes that there was a shift from more premium to less premium products. People didn't want to spend more money on their pet food, but they didn't get the same quality for the same money as previously.

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Source: Euromonitor International

Czech Republic: positives and challenges

Compared with the growth of the Polish and Hungarian markets, the Czech Republic demonstrates steady progress, characterized by moderate growth and resilience despite economic fluctuations. In 2025, the sector has witnessed stable value increases, supported by an improving economy and declining inflation.

Pet care sales have grown in both volume and value terms, with a marginal decline in unit prices allowing for broader accessibility. Key trends include a rising demand for specialized products – such as premium dog food and grooming items – as pet owners increasingly see their pets as family members.

E-commerce and online channels are expanding, with private label products maintaining a market share of over 30%, according to NielsenIQ data. Projections indicate continued expansion, with the market expected to grow at an annual rate of around 5%-6% through the decade, driven by urbanization and shifting consumer preferences toward natural and organic options.

Despite these positives, challenges such as high retail prices and lower adoption rates in some segments could temper growth. The market stability of the Czech Republic positions it as a mature player in the region, balancing tradition with modern trends.

Slovakia: natural and organic

Slovakia's pet care market is on an upward trajectory, driven by increasing urbanization and a cultural shift toward treating pets as family members. In 2025, the market is valued at approximately $40.34 million (€34.53M), with projections of a 1.31% annual growth rate through 2029, according to Statista.

Pet food sales, particularly for dogs, are a major segment, influenced by the demand for natural and organic products. Household ownership rates – while slightly lower than in neighboring countries – are rising, with a focus on dogs and cats.

Customized communication

Euromonitor data shows that e-commerce and retail channels are key growth factors, with consumers

Export is important for the Polish market, with local pet food manufacturers selling their products throughout the EU and to 63 other countries.

seeking customized options such as sustainably sourced food. COVID had a favorable effect on the popularity of e-commerce, says Ladislav Kobolka, CEO of COBBYS PET, a Slovakian pet store chain. Alongside its physical stores, the company has also had an e-shop for some years now.

Kobolka explains: "It's a great help for our business partners that they can order goods when it suits them. They have constant access to new products as well as our promotions. We use our e-shop as an additional communication channel for both our wholesale partners and our consumers. A good website also helps store sales, as customers look at the assortment and current promotions before visiting the store."

Kobolka warns that for e-shops, owning warehouses and stock is crucial. Overspending on advertising without a sustainable revenue model can lead to failure. While e-shops compete with traditional stores, customers still value the in-store experience for certain purchases, preferring the opportunity to touch and feel – and to talk to staff.

Cross-border cultures

The story of COBBYS PET tells us something else about the market in the region. In 1989, Kobolka's father opened a shop selling aquariums, where he started working. In 2001 he opened his own company, which grew and diversified to target all kinds of pets.

Today, COBBYS PET has 6 shops, employs more than 30 people, has a range of over 500 own products and operates in Slovakia, the Czech Republic and Hungary.

In this regard, Kobolka says: "The mentality of all 3 nations is very similar. Cultural and ethical habits are the same and since I can look at it from a distance, I can say that it's a homogeneous part of Europe. People are nice, willing to help, hospitable. We are much more alike than we think."

His biggest difficulty is operating under different regimes pertaining to value-added tax (VAT). In the Czech Republic VAT is 12%, in Slovakia 23% and in Hungary 27%. "The difference in VAT between the lowest and highest rates is an incredible 15% and this distorts the markets. Overall, the 3 markets are very close to each other in terms of purchasing tendencies and brand perception." ◆

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Rich in protein (22%) and fiber, but with a low anti-nutritional factor content, it supports gut health, muscle maintenance and satiety. Its enhanced taste and digestibility make it a strong alternative to animal proteins in vegetarian or flexitarian diets.

Made from 100% yellow pea, it is non-GMO, allergen-friendly, cost-effective and locally sourced in Northern Europe, lowering its environmental footprint.

Presco Yellow Pea can be included at up to 20% in formulations, offering technical and nutritional benefits while supporting structure in cold-pressed kibble and similar applications.

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Timo Tervo, CEO, Pet Network International

"We are looking to enter a sixth country in 2026"



Entrepreneurial by nature, the Croatian omnichannel retailer is keen to take advantage of all platforms that can bring it closer to its customers.



David Palacios Rubio
Editor-in-Chief
GlobalPETS

Originally from Finland, Timo Tervo has spent the last 2 decades living and working across Europe, including 15 years in leadership roles at supermarket chain Lidl.

After his time with Musti Group in the Nordics, he joined Pet Network International (PNI) in 2022 as CEO – an opportunity to invest in the company and steer it into its next growth phase. Today, Tervo oversees operations in 5 countries, with plans to double the store network by 2030.

You operate in several Eastern European countries. Which is the market to watch?

Slovenia is a very mature and high-margin market. From a profitability perspective I would say it is our best market by far. In terms of population, it's relatively small – just 2 million people – and we hold a significant share of the pet specialty trade. As the leading player in Slovenia, most of our competition comes from online, so it is definitely Zooplus that we are competing with.

And which markets have the most room for improvement?

Serbia is a double-digit growth market. The market is maturing, and we've recently taken more market

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share through acquisitions and by opening new stores. Despite Serbia's relatively low GDP compared to our other markets, it offers significant growth potential.

Growth in Bulgaria is also extremely strong. We entered the market a few years back under our Maxi Pet banner, operating 5-6 stores in a very competitive environment. We then acquired Dr. Stefanov, led by Mario Ivanov, who's still our CEO in Bulgaria. All Maxi Pet stores became Dr. Stefanov stores. Today, we operate just over 40 stores and are opening 5-10 annually – more if the right opportunities arise.

In Romania you operate under 2 banners. How is the market performing there?

Romania is one of our top priorities. From a revenue perspective, it's our best-performing country. We operate Animax, with roughly 135 stores, and Maxi Pet, our big-box format with 14 stores. Convenience is becoming increasingly important in Romania, so customers need a good reason to visit big-box locations. Maxi Pet is priced lower than Animax to attract volume buyers.

Our largest Maxi Pet store in Romania has a turnover of about €10 million ($11.6M) annually, making it one of the highest-selling pet stores in Europe. Moving that much volume is a real operational challenge, but Romania is developing fast. Fressnapf has now entered the market, and while we take all competition seriously, it hasn't impacted our business so far.

Do you manage logistics in the same way in different countries?

We have a fully integrated group supply chain and purchasing function. These are operated centrally, but each country has its own teams. To service our markets efficiently, we have a logistics center in every country we operate in. Roughly 50% of our supply comes from group-level suppliers managed centrally from Croatia, and 50% from domestic suppliers. I strongly believe in local brands – they're important for each market.

We see many international businesses expanding without making use of strong local teams. That's against my philosophy. While marketing, finance, supply chain and purchasing are coordinated at a group level, we also maintain full local teams for each function, including a country CEO in every market.

Half of your sales come from your own and exclusive brands...

Across the group, we carry one of the widest assortments in the pet industry – well over 10,000 SKUs depending on the country. In some markets close to 15,000 SKUs. This breadth is a key success factor, particularly online where it is critical to remaining competitive and interesting for consumers. In Romania, we operate a wholesale business too, supplying around 1,000 pet stores, which helps to expand our brand footprint beyond our own network.

Are Eastern European pet parents demanding more in-store services?

Personalized service is increasingly important. Most of our locations feature a pharmacy, and we've recently opened grooming salons in Romania and Bulgaria, with our first high-quality location in the Croatian capital Zagreb. It's early days, but we already see that customers who use our services spend, on average, about 1.5 times more. That's why services will continue to be a growth area, but we will scale them carefully and ensure the business case works.

"Growth in Bulgaria is extremely strong. We entered the market a few years back under our Maxi Pet banner, operating 5-6 stores in a very competitive environment."

What are the differences in basket size across your markets?

In Romania, our Animax convenience banner has an average spend of slightly below €15 ($17). These are high-traffic stores with frequent purchasers, but the average basket has room for improvement. Our destination stores average between €25 ($29) and €30 ($35).

Convenience locations get more visits, but discretionary purchases – especially accessories – are struggling across the pet industry. Competition from online players like Temu is intense. This forces us to constantly review our sourcing strategy, balancing direct sourcing from China against buying from major European vendors and distributors, because accessory margins are tightening.

What's your strategy when it comes to store size?

In Slovenia, our stores are larger than elsewhere. They generally start from 300 sq m, with destination locations exceeding 1,000 sq m. In Croatia, we initially focused on big-box stores of 700-1,000 sq m, but now we're also opening smaller locations, with a minimum of 250 sq m. Anything under 200 sq m doesn't give us enough assortment to generate meaningful revenue.

Romania is different. Our smallest stores there are in extremely high-traffic locations and can be as small as 70-80 sq m, yet still generate around €700,000 ($815,000) annually. We're also opening 150 sq m convenience stores where we can secure good locations, while still investing in big boxes of up to 1,000 sq m when the right site becomes available.

We have moved away from a one-size-fits-all approach. Location is everything. People are less willing to travel far, so convenience is key. Quick commerce is also growing fast, and some of our smaller stores double as hubs for rapid delivery.

You are partnering with quick delivery channels for your pet products...

We've started working with Glovo, and more recently with Wolt, and we've seen immense growth with quick commerce. Obviously, our initial worries were the expense – but running the logistics yourself is also costly. It's comparable to how we look at online. If you want to stay relevant, you have to be on these platforms. That's how I see it.

There is tremendous growth in the sector in Croatia and Romania. In Bulgaria, we started working with Wolt recently, so we are quite excited about this opportunity. From a cost and profitability perspective, we just see it as an extension of our own sales channel. I'm satisfied with it and I think it's part of the future, so it's best to integrate it today.

How's your online channel doing?

Each of our markets has an average online share of sales of between 7% and 12% – definitely lower than in Northern Europe, but growing. From a pet specialty perspective, we are operating online in all markets. Currently, our biggest investments are going into our CRM systems, as we renew everything and put millions into our data capabilities. Knowing your customer is more and more important in Southeast Europe today.

Is there any market where you see more potential to grow online?

I think stores will remain the priority for our business in each of our markets. That is where we invest in infrastructure and try to create the best experiences for pet parents. I don't think online can replicate that.

From a growth perspective, Romania is definitely the highest-potential market for us – simply due to the high number of consumers. Serbia is also a very good online market for us, possibly due to limited competition. It's outside the EU, and we are fairly dominant there in terms of pet specialty online.

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How important is loyalty for PNI?
This is where most of our technical capability investments are going right now. We are replacing some of our legacy loyalty systems to gain more knowledge – because knowledge is certainly power. We want to have a better understanding of consumer behavior.

Depending on the market, 70-85% of our consumers are in our loyalty systems. It's worth remembering that it was just 3.5 years ago that we started from scratch, so we've grown our consumer base quite rapidly. But there's still a lot to do to better understand consumer behavior and patterns, and to gain more detailed knowledge about pets and pet parents.

Bulgaria is adopting the euro in 2026. How do you expect this will impact your business?
We've already done a project like this in Croatia, when the country adopted the euro. Generally speaking, there's some inflationary effect during a change from the domestic currency to the euro, so we have to be very cautious when managing our price points. Changing the currency entails a huge project from the back end. It's not a big challenge, but it does mean major operational disruption for a few months.

From a group and finance perspective, being in the euro is positive, as reporting becomes much easier. For Bulgaria as a country, this is just another step toward becoming a modern European market. We will benefit from it, even though it gives us extra work.

A new currency usually brings some inflation with it...
I hope not. This also depends a lot on the suppliers. Many suppliers might take advantage of the situation, rounding up prices when switching to euros. If the whole ecosystem – from suppliers to retailers – approaches this sustainably, it can be done without harming the end consumer.

As a retailer, we are always cautious and want to remain price driven. Price is very important to us, and consumers tend to be extremely sensitive. If they're not happy with a retailer's price point, they are quite likely to switch.

Are there any expansion plans on the horizon?
In Romania, we believe we can almost double our store count within 5 years, from roughly 145 today to around 250-260. We're opening about 10 new locations this year. That said, we're cautious, as anything below a local population of 15,000 is not viable for us at the moment.

Rural areas are developing, but not all of them are able to sustain a pet specialty store. Romania's main limitation right now is the lack of really good retail spaces. Developers are investing, but it all takes time.

In Slovenia, we can't double our store count due to the small population and the market's maturity level. We estimate we can sustainably open about 25 more stores there without excessive cannibalization. Croatia, Serbia, Bulgaria and Romania will all see a doubling of our store counts. So Slovenia is the only market with real restrictions from a population and maturity perspective.

And any plans to expand internationally?
We are now operating in 5 countries and are number 1 in all of them. There's still growth potential, so we are looking to roughly double our store count in the next 5 years. It's ambitious, but we believe it's doable.

In terms of other markets, Southeast Europe is our main focus. But we are currently reviewing a sixth country we'd like to enter in 2026. I see it as a relatively fragmented market where consumers could benefit from an established retailer.

We're also always looking at acquisitions – reviewing businesses we could potentially acquire and integrate into our group. In our current operating countries, we've basically acquired what there is for sale. So now it's time to look at other markets as well. ◆



Pet Factory ROMANIA

Pet Factory opens new pet food manufacturing hub in Bucharest

The new state-of-the-art facility signals the company's ambitions to lead in the competitive European pet food landscape.

From distributor to manufacturer

Pet Factory began as a family-owned distribution business and gradually expanded into manufacturing, growing significantly over the past 15 years. Today, the company offers over 1,500 SKUs for dogs, cats, rodents and birds, partnering with retail chains, specialty stores and distributors across Romania and Europe.

Building on this growth, Pet Factory recently invested nearly €20 million ($23M) in a new, state-of-the-art production facility. The 9,000 sq m plant, designed according to the highest European standards, incorporates advanced technology from Germany and the Netherlands and holds IFS, ISO 14001 and ISO 22000 certifications.

Certified quality and sustainability

These certifications attest to Pet Factory's commitment to high standards of quality, safety and sustainability. The IFS (International Featured Standards) certification confirms that Pet Factory's products consistently meet stringent food safety and quality criteria.
ISO 22000 ensures the implementation of comprehensive food safety management systems, while ISO 14001 highlights the company's dedication to environmental responsibility and sustainable production.

This investment provides Pet Factory with complete control over production and quality, emphasizing high-quality ingredients sourced locally in Romania. Together with advanced recipes and state-of-the-art processing equipment, the new facility ensures exceptional consistency, safety and palatability, which are crucial factors in today's competitive pet product market.

Own and private label brands

The factory produces Pet Factory's own brands, including Miau Miau, 4Dog, Cat Joy and Dog Joy, as well as private label products for European hypermarkets and distribution partners. Designed to maximize operational agility, the facility offers short production lead times, exceptional flexibility and customized solutions. Clients seeking to develop their own brand products can benefit from tailored recipes, premium quality standards and competitive pricing.

Strategic logistics location

Strategically located near Constanta Port (Eastern EU's largest seaport), the Danube river port of Giurgiu and 3 major highways connecting Romania to Western Europe, the new factory also serves as a powerful logistics hub. Pet Factory's evolution from distributor to modern manufacturer mirrors a broader industry trend toward regional production, increased transparency and stronger cooperation among retailers, distributors and producers. As of 2024, Europe has gained not only a new factory but also a new benchmark in quality pet food manufacturing.

Partnership opportunities

For businesses seeking to build their own brand, Pet Factory offers a modern, flexible and experienced manufacturing partnership. The company enables clients to produce high-quality products that align with their brand vision and values, helping them earn long-term customer trust and loyalty. ◆

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Bulgaria: pet businesses welcome transition to euro

With the Eastern European nation due to join the eurozone from January 2026, how will this move affect the country's pet industry?



Dušan Raičević
Contributor
PETS International

The lev has been the official currency of the Republic of Bulgaria since 1881. The country in the Balkan region, directly south of the Danube river and west of the Black Sea, covers 42,855 square miles (110,994 sq km) and has a population of just under 6.5 million people.

Making economic progress

Despite the country's rather unstable fiscal state of affairs, and a history of high inflation, corruption and labor shortages, there are many positive signs. Bulgaria has achieved a solid score of 0.845 in the United Nations Human Development Index (HDI), landing it in the 'very high' tier and putting it at 55th out of 193 countries. The nation was also designated as a 'high-income economy' by the World Bank, with a gross national income (GNI) per capita of $15,320 (€13,189) as of 2024.

Having been a member of the EU since 2007, on 8 July 2025 Bulgaria was finally endorsed by the European Parliament to enter the eurozone. It will adopt the euro on 1 January next year, making it the 21st member state to do so. However, according to the latest Eurobarometer survey, only 43% of Bulgarian consumers support the new currency's adoption, while 50% are firmly opposed.

Pet food industry reactions

So how is this move being received by businesses in Bulgaria – and particularly in the pet industry? According to Euromonitor, the Bulgarian pet food market is expected to represent €264.4 million ($307.9M) this year, which is an increase of 6.2% compared to 2024. Will becoming part of the eurozone, where the euro is already used by 350 million people, further drive sector growth?

Agromarket International, a leading producer of pet food for birds and small animals, is optimistic.

The Bulgarian pet food market is expected to represent €264.4 million ($307.9M) this year, which is an increase of 6.2% compared to 2024.

The company has been active on the Bulgarian market for over 20 years and exports to dozens of countries – not only in Europe but also the likes of Singapore, Costa Rica and Panama.

A positive move for business

In an interview with PETS International, Director Zdravko Gospodinov says that entry into the eurozone will be beneficial for business. Agromarket's revenues are almost entirely in foreign currencies: 65-70% in euros and the rest in US dollars. However, production costs and many raw materials are paid for in lev.

"The immediate positive change for us will be that we will not pay any more foreign exchange commissions to the banks when we convert our euro revenues into Bulgarian lev," he states, adding: "Accepting the euro will also bring some other positives for the economic environment here, like lower inflation and lower rates for loans."

Furthermore, the owner of Agromarket believes that the Bulgarian pet food industry will continue to grow after the official introduction of the euro because the resulting rise in disposable income will further improve the economic situation.

Enhancing scalability

Another key Bulgarian supplier to the pet industry is Nasekomo, headquartered in Lozen (18 km from the capital, Sofia). Back in 2017, the company became the first insect-rearing farm in the Southeast European region, and today it is one of the leaders in the production of insect-extracted proteins, predominantly from the black soldier fly.

According to CEO and co-founder Marc Bolard, the company already relies on the euro when it comes to funding, procurement and scalability planning.

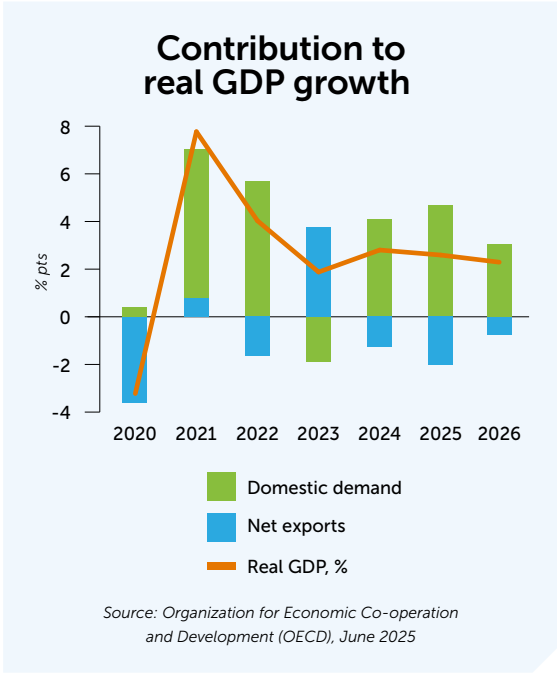
Bulgaria's official transition to the euro "will only enhance our ability to execute consistent, replicable bioconversion projects at scale", he says. "Adopting the euro removes currency conversion hurdles. We can manage genetics, robotics and manufacturing investments seamlessly across Bulgaria and within the eurozone."

Supporting product development

"We're already seeing interest from Bulgarian players exploring differentiated, sustainable offerings. The next step is greater collaboration between ingredient suppliers and pet

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Source: Organization for Economic Co-operation and Development (OECD), June 2025

food manufacturers to accelerate product development and consumer adoption," continues the CEO.

"I believe Bulgaria can position itself not just as a user of innovative feed solutions, but also as a producer, supplying sustainable pet food ingredients across Europe," concludes Bolard.

Pivotal retail milestone

Nikola Ninov, Managing Partner of Bulgarian pet retailer Petmall.bg, sees the adoption of the euro as a "pivotal milestone for the region's economic integration and business environment".

With a retail footprint of 17 physical stores plus an e-commerce platform, the company serves both urban and rural pet communities with product lines including premium pet food, wellness items, toys, grooming products and veterinary support.

He anticipates the shift to the new currency bringing improved currency stability and predictability. "Transitioning to the euro will reduce currency exchange risks and improve pricing transparency. This is particularly important for companies like ours that import ingredients and products or operate cross-border," he says. "With one currency across multiple markets, we can streamline procurement, unify pricing strategies and reduce transaction and hedging costs."

Additionally, Ninov envisages an increase in investor confidence and expansion. "Euro adoption sends a signal of economic maturity and stability. It could attract more investment into the pet sector, encourage regional expansion and allow companies to scale operations more confidently," he comments. This is particularly relevant in the context of the retailer's own ambitious growth plans. Petmall has locked 9 contracts for new openings in the next 18 months alone.

Transitional challenges

Ninov is aware of the challenges associated with any currency switch, however, in terms of technical preparation, pricing recalibration, staff training and customer education. Inflation perception and price rises can also impact on consumer trust, he says.

In this context, he mentions the Euro Adoption Act that was approved by Bulgaria's Parliament on 30 July 2025. As part of this regulation, which is aimed at preventing unjustified price increases, most Bulgarian businesses – including Petmall – have been required to display prices of goods and services in both lev and euro since 8 August 2025.

"While there is no outright ban on price increases, companies must justify them transparently. Violations could result in fines of up to 1% of annual turnover, particularly for larger firms," explains Ninov. The dual-pricing requirement will remain in place until the end of 2026.

Acknowledging these and other challenges, he emphasizes that it is crucial to manage the transition delicately. "We hope that the Bulgarian market will adopt relatively fast and we will not have a decline in market demand in the short term," concludes Ninov, no doubt echoing the thoughts of all businesses involved in the nation's pet industry. ◆

Most Bulgarian businesses have been required to display prices of goods and services in both lev and euro since 8 August.



Wojciech Kamiński, Managing Director, Maxi Zoo Polska

"Finding good-quality locations for our expansion is a big challenge"



On 6 August, Maxi Zoo opened its 151st store in Poland, making it the leading company in the country's pet retail sector. What's next for the business?



Fabio Turco
Contributor
PETS International

Maxi Zoo entered the Polish market in 2012 with Country Manager and Managing Director Wojciech Kamiński overseeing its growth from day one. He tells PETS International how the company is developing, the challenges it faces and its plans for the future.

Talking about the company's progress in recent years, he says: "We are now present in most of the agglomerations above 50,000 inhabitants, and we are the only pet business that is providing our customers with a new shopping experience."

How has the Polish retail landscape changed in the past decade?

When we joined the market in 2012, the typical Polish pet store was around 40 sq m, not well-stocked, a bit chaotic, and you usually paid for the products by weight. Since then, we have opened big stores where you can find up to 8,000 articles. We sell a curated range of products from economy to super premium, non-food and food.

We started to introduce to the customer the idea that if you want to have a good life for your pet, you have to feed and treat them well. 12 years ago, only 20% of Polish pets were fed with well-prepared or, let's say, functional food. Now, this has increased to 50%, and in this sense I believe we were the ones who changed that market.

You have opened more than 150 stores in 13 years. What's next?

In 2024, we opened 27 stores and we will open another 26 locations this year. In the next few years we are planning to open, on average, 20 locations per year. We believe that the future target for our chain of stores in this market would be growth in the triple-digit range. Of course, it depends on how the market develops.

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Is this growth in the number of physical stores also matched by an increase in e-commerce?

Yes. We started our online store in 2019, just before the pandemic. So we were basically in a quite good position when the pandemic broke out, as we had the online option ready. Since then, of course, online sales have been growing quite significantly. Right now, e-commerce has around 13% of the share of our total sales.

What is your approach to omnichannel?

We want to be ready to meet customer needs and follow the changes in customer behavior. According to a recent report, more than 50% of Polish customers are buying products both offline and online, 31% buy offline only, and 19% only do their purchasing online. This will obviously change over the years due to demographic changes, because younger people tend to purchase online a bit more than offline. For us, the most important thing is to give our customers a seamless way to switch between offline and online.

For example, we recently launched a click-and-collect option. This benefit gives customers the opportunity to choose the desired product online – via our app or web page – and to pick it up from our store within even 1 day.

Your app recently reached 1 million users...

We launched the app in 2022, and today around 60% of our sales go through our app. It gives customers access to our online store, but it has also other functions. For example, the click-and-collect service and 'Little Friends', which provides advice and support for people who have welcomed a new young pet into their home.

Which are the best performing categories on your shelves?

The biggest category is still food. Just 50% of the pets in Poland are fed with commercially prepared pet food while in Germany, for example, that's more than 90%. Although food holds the largest share, there is still significant room for growth, even within such a fundamental category.

Recently, we've seen the most growth in snacks. People want to reward and treat their pets with snacks, in addition to their basic meals. You are also seeing some kind of shift from economy products to slightly higher-level products.

There's noticeable growth in training products. Additionally, certain types of supplements are gaining popularity, as customers have come to understand that their pets also need supplementation, especially when it can support specific health conditions. Products related to fleas and – particularly – ticks are currently a hot topic, and they're selling quite well. It is an interesting time for product development and sales in this segment.

What about other categories, such as insect-based or plant-based pet food?

As part of our assortment, we have included some kinds of bio products and even plant-based food. But sales and overall interest in these products is quite minimal. People are trying, but it's not something that currently generates much interest among a larger group of our customers at Maxi Zoo.

How much do your customers spend on average?

A Polish customer spends around €270 ($316) to €280 ($328) per year on their pet. If we compare Polish and German customers, the average basket value in Poland is still around 60% of that in Germany.

Compared to Switzerland, Denmark, Italy or France, the difference is even greater. However, we are seeing an increase in average expenditure, driven by an increase in average salaries.

Are you seeing any differences in the performance of the dog vs the cat market?

We are seeing stronger growth in the cat market. It is growing faster due to the fact that, since the pandemic, people want to travel and cats are much more independent companions. The only part of the dog market that is growing is the small dog segment. In the big dog segment, numbers are declining.

What are the biggest challenges you're currently facing?

Finding good-quality locations for our expansion is a big challenge. Poland is becoming very expensive and the rents are quite high. Also, there are not enough suitable spaces available to meet the needs of all the retailers looking to expand. For many years shopping in Poland was based on the shopping malls – there were no high streets.

So, basically, these shopping centers were the only available option, and they continued to be developed for quite a long time. Over the past couple of years things have started to change because customers are now looking for convenience. People have stopped going to big shopping centers because they don't want to spend hours there.

The second challenge is related to the Polish labor market. It's becoming more and more difficult to get new employees on board. That is because our demographic is changing and the unemployment rate is currently very low.

"According to a recent report, more than 50% of Polish customers are buying products both offline and online, 31% buy offline only, and 19% only do their purchasing online."

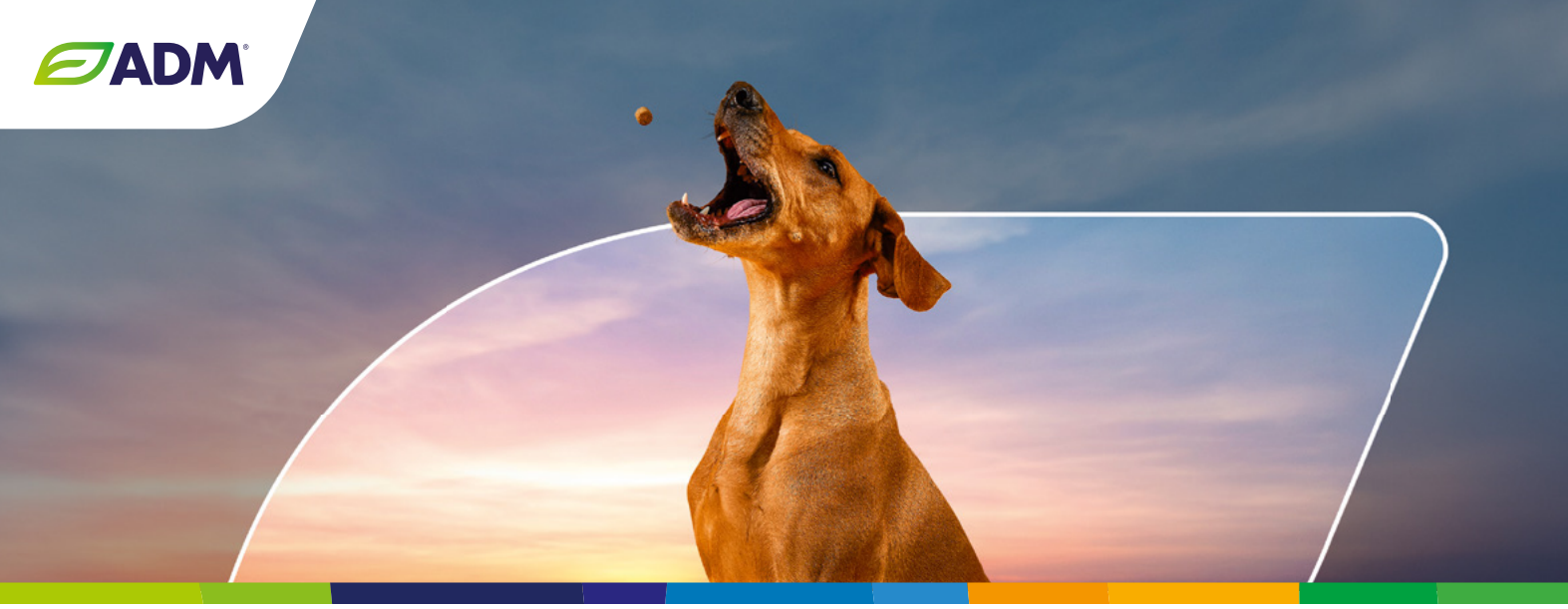
What lies ahead for Maxi Zoo Polska?

We want to be an indisputable market leader in the pet business here in Poland. To make that happen, we're going to develop our chain of physical stores. We're also going to grow our online business so we can provide an omnichannel experience for all our Polish customers.

That's why we're investing in additional functionalities such as click-and-collect, and further developing our mobile app. We're also going to develop a new, different type of store format to give us a chance to expand in city centers.

We want to invest in an urban-style store, with a smaller space and a different kind of assortment. Our goal is to find solutions for the blind spots within big agglomerations, where our current format cannot be implemented due to a lack of suitable locations. ◆





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The US legislation paving the way for immune health benefit claims

Consumers want more supplements for their pets that support the immune system. Legal developments in America could help make such products more viable.





Emma Penrod
Contributor
PETS International

Although primarily concerned with livestock, the Innovative Feed Enhancement and Economic Development (FEED) Act could open new doors for the pet supplement industry in the US, according to proponents. Introduced on 18 March this year, the act would allow probiotic makers to make broader health benefit claims – claims previously limited to prescription drugs – if the supplement acts solely within the animal's gastrointestinal tract.

Inspiring innovation

Advocates of the pet supplement industry say this proposed legislation could spur innovation and a spate of new products to match the growth in demand that has followed the COVID-19 pandemic. It might also address the lack of scientific research driven by slim commercialization prospects for new pet immune booster supplements, according to Dana Brooks, President and CEO of the Pet Food Institute (PFI). "If it takes years and millions of dollars to get a single ingredient to market... it will prohibit research if [manufacturers] don't feel like there is an opportunity to take it to market as well," she states.

The timing of this development is favorable, particularly in tandem with the second Trump administration's broader Make America Healthy Again (MAHA) campaign. Preventing chronic disease through healthier lifestyle choices is the primary aim of the MAHA movement.

Growing consumer interest

What seems clear is that consumer interest in immune-support supplements is soaring – including for their pets. "What are humans doing now? We are doing a lot of supplements in our diets. So consumers are like: 'If it's good for me, it's good for my pet,'" explains Brooks.

Animal supplements as a whole now bring in $2.5 billion (€2.15B) annually in the US, which remains by far the largest market, according to Bill Bookout, President of the National Animal Supplement Council (NASC). He adds that other countries also show signs of growing consumer interest in animal supplements.

The Pet Food Uniform Regulatory Reform Act authorizes the US Food and Drug Administration to set nationwide standards for dog and cat food and related products.

While joint health and calming supplements remain the bestselling categories in the pet supplement sector, immune health saw sales grow by around 20% during the pandemic, Bookout says. Immune-support supplements aren't growing at quite the same rate as during the pandemic, he notes, but sales have yet to return to their pre-COVID levels. Instead, he says the category has settled into a more sustainable 1-3% growth rate, as specific categories – ranging from probiotics to functional mushrooms – continue to gain ground.

Regulation is holding back growth

Both Brooks and Bookout identify regulation as a key factor holding back the growth of pet health supplements. In the US, animal supplements are regulated at state and federal level, creating a patchwork of rules for companies introducing new products. The situation is much the same on the international level, with rules varying widely from one country to the next.

"A national industry cannot operate in an environment of inconsistency, where one label or claim is OK in some states but not in others," comments Bookout. "A national industry doesn't make products differently for different regions. You have to have consistency."

The Pet Food Uniform Regulatory Reform (PURR) Act of 2024 is designed to correct this, at least within the US. It authorizes the US Food and Drug Administration (FDA) to set nationwide standards for dog and cat food and related products such as treats, replacing the outdated and inconsistent state-by-state approach currently used for ingredient and label approval. The PFI hopes it will also put pressure on regulators to approve ingredients in a more timely fashion.

Limited research

As the market opportunity for new immune-health ingredients expands, there's also a need to ensure that the research is keeping pace with consumer trends. And while Brooks believes that clearing the regulatory roadblocks will increase funding for new research, the science on animal supplements is currently lagging, according to Ana Rita Cabrita, an Associate Professor of Animal Nutrition at the School of Medicine and Biomedical Sciences at the University of Porto, Portugal.

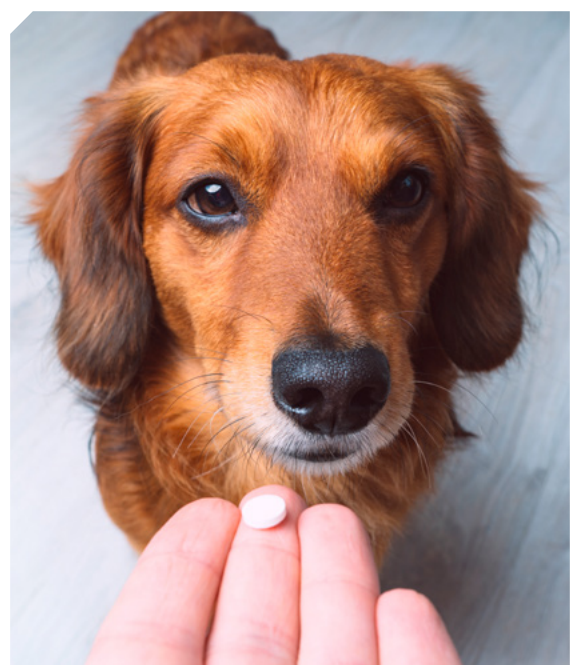
According to Bookout, dog owners currently buy 70-75% of pet supplements sold in the US. Bookout suspects that this is because dogs are more likely to accept a treat-like soft chew than cats, which tend to be more finicky about new food items.

However, Rita Cabrita explains that few studies have focused on the effects of immune-health supplements in dogs. "Most available research has been conducted on rodents or humans, offering limited insights applicable to companion animals," she states. The studies that have been conducted in dogs have been relatively short, so the long-term effects of these supplements "remain largely unknown", she adds.

Room for new developments

But there is research underway. Rita Cabrita's group in Portugal has been investigating shrimp and insect hydrolysates, and is now looking at the potential of byproducts from the human food chain such as tomato pomace, which has a high fiber content and contains lycopene, which is known to have strong antioxidant properties. They're also looking at the performance of omega-3s from fish and microalgal sources. All these represent potential immune-health supplements that can also tout the 'natural' origins that appeal to today's consumers, Rita Cabrita says.

With developments on the regulatory and research fronts and a growing market opportunity, "there is a lot of room for ... expansion, growth and continued innovation in animal supplements", Bookout concludes. "Trends you see developing on the human side will rapidly take hold on the animal side." ◆





Re:Source BELGIUM

Transforming French fry waste into a premium, sustainable pet food ingredient

Belgian company Re:Source converts potato processing byproducts into functional dried meal for grain-free pet food formulations.

Leveraging industry expertise

Re:Source N.V., based in Wielsbeke, Belgium, was founded by professionals with long experience in the potato processing sector. Drawing on this background in process development and operational management, the company established a dedicated facility to turn byproducts from the French fry industry into dried potato meal for pet food applications.

Located in the heart of a region where large volumes of potatoes are processed, Re:Source has direct access to raw material from nearby French fry production plants in Belgium. By sourcing close to home, transport distances are kept short. This approach reduces environmental impact and helps maintain the quality of the potatoes before processing.

At its Wielsbeke site, Re:Source uses a pre-treatment and drying method developed in-house to preserve quality and consistency. The system consumes less than one-third of the energy typically used in conventional potato drying, while producing stable and uniform output, free from unpleasant odor and discoloration.

Product benefits and applications

Potato meal is widely used in grain-free pet food formulations. Its functional properties can improve kibble expansion and texture during extrusion. Its high oil absorption capacity positively affects coating homogeneity. Nutritionally, it provides a digestible starch source and serves as a fermentable substrate for gut microorganisms.

The dried potato meal is produced by grinding and drying raw potato shreds from the French fry industry. It contains around 65% starch, 6% crude protein, and 10% moisture, with a soft texture and light beige-grey color. The product is available in bulk or big bags, with a shelf life of up to one year.

Supporting circular innovation

By utilizing potato byproducts that would otherwise be discarded, Re:Source contributes to waste reduction and resource efficiency in the food chain.

For pet food manufacturers, it offers a steady supply of plant-based material with a predictable nutritional and functional profile.

Beyond current production, Re:Source continues R&D efforts to further valorize all side streams of the potato processing sector.

The aim is to ensure that no part of the potato goes to waste, expanding the range of applications while supporting a more circular food system. ◆

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Gut health gains ground as a priority for pet food buyers

The interest in ingredients that promote digestive balance is shaping both purchasing behavior and innovation across the world of pet nutrition.





Ekaterina Tretyakova
Senior Market Analyst
Innova Market Insights

Today's focus on gut health in cat and dog food reflects a wider shift in consumer priorities. As people pay more attention to enhancing their own health and wellbeing, they look for products that offer similar benefits for their pets.

A factor in pet wellbeing

Digestive health is becoming especially important as it's frequently linked to a pet's immune system and overall health. Stronger emotional connections between pets and owners play a key role in this shift.

According to Innova's Pet Owners Survey 2025 of 5,000 respondents in the UK, Germany, Brazil, the US and China, around 45% of pet owners consider their pets to be family members, so they always take their pet's health into consideration.

Currently, gut health is one of the top worries for pet owners. Among cat owners, 16% consider it a health concern – second only to weight management. For dog owners, digestive health ranks third, following weight and joint issues, with 17% of respondents expressing concern.

Interest in gut health is particularly strong among younger generations, such as millennials and Gen Z, an indication that demand is likely to increase further in the coming years. For example, while only 1 in 10 baby boomers is concerned about their cat's gut health, among Gen Z owners that number rises to nearly 20%.

Making greater claims

It appears that digestive health is having a significant influence on brand loyalty. More than 70% of pet owners say they are likely to switch products or brands if their pet experiences digestive discomfort. This puts pressure on manufacturers to address gut health proactively through formulation and positioning.

Reflecting this consumer concern, the number of pet food launches with digestive health claims has increased steadily over the last 5 years. These claims are especially prominent in dry food formats, where over 60% of new innovations – in both dry cat and dry dog food – in 91 countries worldwide are positioned to support gut health. Claims like these have been gaining ground in wet food formats as well, especially in cat food.

More than 70% of pet owners say they are likely to switch products or brands if their pet experiences digestive discomfort.

Gut claims in both dry and wet subcategories have shown even stronger growth in 2025. Digestive health benefits are also common in pet supplement innovations, which peaked in 2024 and have continued to see modest growth this year.

Studying the ingredients

Ingredient transparency is becoming more important to consumers. According to Innova's consumer survey, more than a half of pet owners always look at the ingredient lists of products that they buy, especially millennials. This focus is particularly strong in markets like China, but in Brazil, Germany, the UK and the US, the ingredient list is also the packaging information that pet owners pay the most attention to.

Gut health claims are often supported by the inclusion of functional ingredients, particularly prebiotics and fiber. These components are widely associated with digestive benefits and are increasingly highlighted on packs, reflecting consumer interest – around 60% of pet owners say they would like to add fiber to their pet's diet.

Higher fiber content

In 2025, 51% of new pet food launches with digestive health claims also featured prebiotics, and more than a third highlighted a high fiber content.

These figures have steadily grown. Back in 2021, less than a third of food products with digestive health claims also claimed prebiotic content. The share of products highlighting fiber has also visibly increased since 2021.

The UK and the US are leading globally in terms of pet food innovations with digestive claims combined with prebiotics and fibers. Besides health benefits, this growth is attributed to the compatibility of these nutrients with multiple formats, such as dry and wet food, treats and supplements. Nevertheless, the most innovations with prebiotic and fiber claims are still tracked in dry dog and cat food.

Popular prebiotic sources

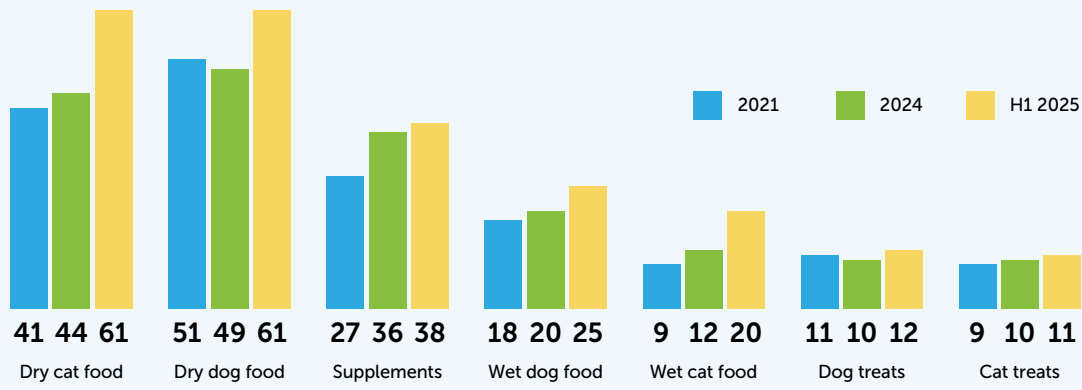
To provide a more complete picture, Innova complements its claims analysis with ingredient data from new product launches. Prebiotics commonly used in pet food innovations include oligofructose, inulin, mannan oligosaccharide and chicory root. At the same time, chicory fiber and galacto-oligosaccharide are emerging almost from nowhere in Taiwan and Japan.

Regional profiles vary. In North America, inulin and chicory root are the leading prebiotics, while in Europe, oligofructose and mannan oligosaccharide are driving growth. When it comes to fiber, fast-growing sources

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Share of new pet food launches with digestive and gut health claims

(in %)

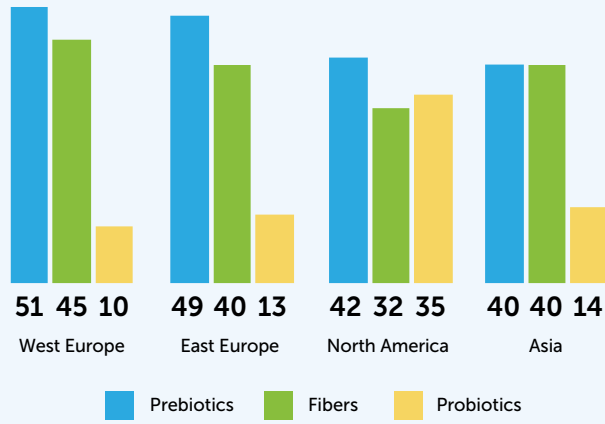


Source: Innova Market Insights, Products Database (covering 91 countries)



Share of pet food launches with digestive health claims that also contain prebiotics, fibers or probiotics

(in %)



Source: Innova Market Insights, Products Database (covering 91 countries)

include beta-glucans and vegetable fiber, in addition to more established ones like oligofructose and inulin.

It is important to note that many products include functional ingredients without clearly claiming their digestive benefits on the label. Only 45% of pet food products with prebiotics or fibers launched since 2021 made a digestive or gut health claim. This gap suggests an opportunity for brands to better communicate ingredient functionality and strengthen consumer trust.

Postbiotics vie with probiotics

Unlike prebiotics, probiotics are facing more challenges in pet food applications. Their sensitivity to heat, moisture and oxygen makes them harder to include in standard manufacturing processes, especially for shelf-stable products. In the first half of 2025, only 13% of gut-health-focused product launches included probiotic claims – down from 20% in 2021. Probiotics are used more frequently in North America, while adoption in Europe and Asia remains much lower. Probiotics are notably more prevalent in pet supplement innovations, appearing in 1 out of 5 new product launches over the past 5 years. This is largely driven by strong consumer interest, with 40% of the pet owners who give supplements to their pets choosing probiotics.

Emerging solutions such as postbiotics offer a promising path forward. These ingredients are more resistant to manufacturing conditions and can help deliver gut health benefits in formats such as dry food, which have traditionally been difficult environments for probiotics. However, they remain niche ingredients – in 2025, less than 5% of new pet food launches with digestive health claims have featured postbiotics, which were first used in 2021 (when they represented 0.3%).

Brands vs private label

As much as 97% of pet food products with gut health benefits launched over the past 5 years have come from branded companies. These brands are increasingly featuring digestive health benefits in their innovations. The share of new launches with claims like these has increased from 23% to 30% since 2021.

By contrast, private labels have shown limited engagement with this trend, and their interest has remained relatively unchanged over the past few years.

Only 1 out of 10 new pet food launches by a private label in the first half of 2025 had a digestive health claim. During the past 5 years, digestive health did not break into the top 10 claims among new pet food launches by private labels.

This reflects the higher complexity and cost of developing products that promise digestive benefits. Branded companies often have better R&D, sourcing and marketing capacities – advantages that private labels may lack.

As a result, digestive health remains a more accessible innovation path for established players with premium positioning, while private labels continue to focus on core needs and value-driven products.

Spotting opportunities

Digestive health remains a key innovation area in pet food, driven by pet humanization and growing consumer awareness of the link between gut health and overall wellbeing. As pet owners become more ingredient-conscious, they are seeking products with clear digestive benefits.

Brands might consider targeting younger generations – millennials and Gen Z – who are driving demand for benefit-led products with transparent labeling and added value.

While dry food leads in gut health claims, wet formats remain underused and present a strong opportunity for differentiation. Brands can also move beyond general claims by highlighting functional ingredients such as fibers and biotics. Many of these ingredients are already used but not clearly linked to digestive benefits on packaging – where there is an opportunity to build trust and clarity.

To gain consumer trust and loyalty, brands could explore vet-supported positioning that gives digestive claims more credibility, especially for those pets with special needs or health problems. The supplements segment also offers additional space for featuring functional ingredients.

Digestive health is set to remain a central focus in pet food innovation and future growth is likely to be driven by more tailored benefits and functional ingredients that meet the specific needs of pets and their owners. ◆

In 2025, half of new pet food launches with digestive health claims featured prebiotics and more than a third highlighted a high fiber content.

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Could *L. reuteri* offer a competitive edge in pet nutrition?

Microbiome-focused pet nutrition is growing, but barriers remain. NBF LANES BIOME offers science-backed solutions.



Pet food and supplement manufacturers are seeing rising demand for gut health-focused products, as gut health is increasingly recognized as a cornerstone of pet wellbeing.

Probiotics and postbiotics are playing a central role in both preventive care and support for gastrointestinal and systemic health. Yet the presence of these ingredients in dry and wet food remains limited, due to process constraints, stability issues and regulatory complexity.

Through its dedicated NBF LANES BIOME division, the company offers patented, science-backed solutions and expert support to help manufacturers navigate these challenges and bring next-generation gut health products to market.

Scientifically validated probiotics

NBF LANES BIOME has developed a complete platform based on *Limosilactobacillus reuteri*, one of the most researched probiotics in both human and veterinary science.

Its species-specific strains include: DSM 32203 (NBF 1) for dogs, and DSM 32264 (NBF 2) for cats.

These are the only *L. reuteri* strains in their category authorized by EFSA, protected by patents that guarantee stability in dry pet food. Their key characteristics include:

- High resistance to gastric pH and bile
- Intestinal adhesion through biofilm formation
- Reuterin production for microbial balance
- SCFA (butyrate) stimulation for gut integrity
- Absence of antibiotic-resistance factors

Their stability and targeted action make them ideal for supplements, and - which is unique - for inclusion in dry pet food using proprietary methods.

A flexible postbiotic solution

Postbiotics offer valuable microbiome support, especially in wet food where high-temperature sterilization eliminates live probiotics. NBF LANES BIOME's *L. reuteri* NBF DC PRO provides a stable, bioactive postbiotic for dogs and cats that enhances gut health strategies.

This postbiotic obtained via fermentation and heat inactivation delivers functional metabolites that:

- Stimulate SCFA production
- Support immune modulation
- Improve probiotic stability

The solution works independently or combined with *L. reuteri* in supplements and dry food, offering versatility in product development.

Comprehensive support

With nearly 4 decades of veterinary nutrition experience, NBF LANES continues to push boundaries. Through NBF LANES BIOME, it offers tailored support to pet food and supplement manufacturers.

Services include needs analysis tailored to brand goals and technologies, custom formulation and microbiome-focused R&D, regulatory support including EFSA dossiers, and co-branding opportunities. Whether developing new products or upgrading existing ones, manufacturers can rely on NBF LANES BIOME's authorized *L. reuteri* strains and stable postbiotic solutions to bring science-backed gut health innovations to market. ◆

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The potential of pet gut microbiota modulation

Offering supplements that claim to boost digestive health and the brain-gut axis is a burgeoning trend, but robust evaluation is needed to ensure recommendations remain scientifically sound.



Jelena Suran
CEO
Apiotix Technologies

Products targeting gut microbiota modulation in pets are a growing market, and it's a sector that is likely to continue to increase its output. As more studies continue to report on the effects on pet health, it's essential that guidelines and regulation keep pace.

Microbiota in gastrointestinal health

The so-called 'trio for gut microbiota' (prebiotics, probiotics and postbiotics) are being extensively investigated for their potential health benefits in companion animals. Recently, there has been substantial improvement in the number and quality of studies.

Already this year numerous trials have investigated the trio's benefits for dogs' gut health, including a study by a team from Chinese veterinary research institutions published in May in *Frontiers in Microbiology*, which reported that the yeast probiotic *Saccharomyces cerevisiae* could be used to help with rapid diet transition.

A further Chinese study published in April in the journal *Veterinary Sciences* demonstrated that *Enterococcus faecium* Kimate-X and *Lactobacillus plantarum* Kimate-F helped in alleviating inflammatory bowel disease (IBD) symptoms in dogs and that *Enterococcus faecium* Kimate-X helped in reducing transport stress in dogs.

Through their work on *Enterococcus* and *Lactobacillus*, the authors of the study propose that the probiotics studied work "synergistically to restore gut homeostasis, reduce intestinal inflammation, and enhance host immunity", but clearly the benefits of gut microbiota modulation go beyond gut health and digestion.

It is known that cats have a microbiota distribution that differs from dogs, highlighting the need for more feline-specific research.



Further health benefits

Different studies have focused on other potential benefits of microbiota modulation. Probiotics produce short-chain fatty acids (SCFAs), which have anti-inflammatory activity in general and can even reduce cytokine production in organs such as the skin.

A May 2025 study from a research team at the University of Adelaide published in *Veterinary Dermatology* found that daily oral probiotic and postbiotic supplementation modulated canine skin microbiota, which might have an implication in skin protection from infections. Other commercial probiotics (*Bifidobacterium bifidum, Lactobacillus acidophilus and Enterococcus faecium*) helped with canine atopic dermatitis, according to recent research published in the *BMC Microbiology* journal in April.

The health benefits are not just due to enhanced immunity or gut barrier, but also because of modulation of the brain-gut axis. Microbiota can affect production of signaling molecules (neurotransmitters) such as serotonin, involved in regulating mood, sleep and cognition, and gamma-aminobutyric acid (GABA), which plays a vital role in regulating brain function.

Thus, probiotics are now being used to improve skin and mental health, reduce anxiety and even help with behavioral problems. Although it might sound 'edgy', the mental benefit of gut microbiota modulation is not such a surprise, as even 10 years ago scientists started to increasingly investigate the potential of probiotics in improving human mental health.

This was followed by studies with pre- and postbiotics, and finally synbiotics. Unsurprisingly, and with the classic decade delay, the growing interest coming from both academia and industry is repeating the microbiota research trend in animal health.

Trusting the science

The abundance of studies showing benefits in dogs should, however, be evaluated cautiously due to recently detected publication bias. A systematic review published in March 2025 in the *Canadian Veterinary Journal* concluded that a large number of studies that reported no beneficial clinical outcomes from using probiotics will later not be published as full papers.

Probiotics produce short-chain fatty acids, which have anti-inflammatory activity in general and can even reduce cytokine production in organs such as the skin.

Additionally, there remains a clear lack of studies on the benefits of probiotics and similar products for cats. It is known that cats have a microbiota distribution that differs from dogs, highlighting the need for more feline-specific research.

Studies showing benefits of probiotics beyond gut health via gut-brain axis or gut-brain-skin axis in pet cats remain to be published, but this could be only a matter of time.

The most recent clinical evidence published in March 2025 in the journal *Microorganisms* shows that in cats, complex probiotics (such as *Bifidobacterium animalis subsp. lactis BX-259, Lactiplantibacillus plantarum LP-301, and Lacticaseibacillus rhamnosus*) can help with constipation, while a previous study in *Animal Microbiome* from 2023 showed that probiotics such as complex *Bacillus* sp., help with diarrhea in cats.

A further 2025 paper published in *Animals* journal in May used yoghurt with postbiotic in combination with inactivated *Pediococcus lactis* and found lowered metabolic parameters (e.g. triglycerides, urea etc.), as well as mediators of inflammation. However, the clinical relevance of this remains to be elucidated as all the animals in study remained healthy regardless.

Regulation and safety

The exploration of gut microbiota modulation and its implications for pet health is expanding. But with potential efficacy, one must have in mind potential obstacles in the shape of regulatory approval and safety evaluation.

For this, publicly available European Food Safety Authority (EFSA) expert evaluations of safety and efficacy of various probiotic formulations for pets can be used for guidance. Regulatory evaluations can slow development but will ensure that the gut modulation approach in veterinary practice remains scientifically based and sound – for the benefit of companion animals and their owners. ◆

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Exploring the potential of spray-dried porcine plasma in canine health

New research investigates SDP's effect on dogs with gut issues.



Ilva Noa Stellingwerf, Msc
PhD Candidate Wageningen University
Sonac, by Darling Ingredients
sonac.biz

Spray-dried porcine plasma (SDP) has long been used in both food and feed for its water-binding and immune-supporting properties. Its immunological benefits have recently gained more attention in scientific literature.

In 2023, Wageningen University and Sonac, part of Darling Ingredients, launched a larger research project to investigate the use of SDP in dogs with both acute and chronic intestinal problems.

SDP is produced by spray drying the plasma component of porcine blood and contains various proteins, including immunoglobulins. These immunoglobulins serve as key defense mechanisms in the body, with several varieties targeting a broad range of pathogens.

Previous studies have shown that SDP supports intestinal health, particularly during bacterial challenges or in cases of long-term intestinal diseases. However, most existing research has focused on small animals or production animals like pigs and chickens. Data on SDP's potential benefits for dogs remains limited.

Collaborative research project

The current project comprises several linked research questions. Initial efforts have focused on the ability of porcine immunoglobulins to bind bacterial and viral pathogens associated with canine intestinal issues.

Results are expected to be published soon.

Researchers are also examining whether the presence of porcine immunoglobulins can enhance the function of immune cells by binding to pathogens. While interaction between porcine immunoglobulins and canine immune cells has been observed, further *in vitro* testing is ongoing to determine whether this stimulates or suppresses the immune response.

Optimizing dietary integration of SDP

Another objective is to explore how SDP can be effectively incorporated into canine diets. Researchers are seeking to strike a balance between the heat and pressure used during processing and the functional concentration of SDP in the intestines to ensure optimal impact on canine digestion.

To validate earlier findings, *in vivo* trials have also been initiated. A completed safety study found that even high concentrations of SDP caused no health issues in healthy beagles. New studies involving privately owned dogs are now being set up.

These trials will focus on animals suffering from chronic diarrhea to assess whether immunoglobulins can provide measurable intestinal support.

Next steps in research

Early outcomes suggest that SDP may offer dietary benefits for dogs. The research team is now preparing to test how these results hold up in dogs with existing intestinal problems. Recruitment for the next phase of studies is expected to begin soon. ◆

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

Why Mono-Material Pouches?

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

The Sustainability Advantage

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

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

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

Staying Ahead of Regulation

EU PPWR & UK EPR are reshaping packaging requirements:

- By 2030, all packaging in the EU must be recyclable by design.
- UK EPR fees start in October 2025, incentivising lighter, recyclable packs.

Tyler Packaging helps brands navigate these changes with solutions that are compliant, cost-efficient, and future-proof.

How Tyler Packaging Designs Circular Pouches

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

Business Benefits

- **Cost efficiency:** Simplified films are easier to source and produce.
- **Freight savings:** Lighter packs, more units per shipment.
- **Compliance advantage:** Early adoption reduces future EPR fees and regulatory risk.
- **Retailer alignment:** Mono-material packs score higher in audits and scorecards.

Tyler Packaging Roadmap for Pet Brands

If you have not already;

Over the next 6–12 months, Tyler Packaging guides brands to:

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

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

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

With PPWR timelines in the EU and UK EPR fees approaching, there's no better time to simplify, standardise, and future-proof your packaging.

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

For more information, visit our website www.tylerpackaging.co.uk or visit our social channels. /company/tyler-packaging /tylerpackaging/

Exploring the geopolitical factors affecting pet food players' ESG efforts



Sustainability-related work has become both more challenging and more critical, but there are still reasons for optimism, according to experts canvassed by PETS International.



Louise Davis
Contributor
PETS International

It is a testing time for those working on environmental, social and governance (ESG) activities. Against the backdrop of a chaotic and rapidly changing political situation, pet food businesses must hit sustainability targets, up their social responsibility game and maintain consumer trust – all while facing extremely challenging economic conditions.

Supply chain disruptions

The war in Ukraine has been a notable disruptor, affecting the supply chain of several raw materials used in pet food. As a knock-on effect, there have been problems with ESG sourcing transparency.

Similarly, boycotts and supply chain disruption due to the current situation in the Middle East are prompting some players to prioritize supply continuity over sustainability.

"The geopolitical and economic turbulence we're seeing today has undoubtedly made certain terms politically charged," says Jim Lamancusa, Executive Director and CEO of the Pet Sustainability Coalition (PSC). "We've had a few members not renew their membership because there was a corporate directive to cease all Diversity, Equity, and Inclusion (DEI) activity."

Terminology shifts

He adds that the terminology around sustainability work is shifting: "Terms such as 'DEI' have evolved to 'community/employee engagement' or 'culture of belonging' and 'global warming' has been replaced with 'climate resilience' and 'future ready'."

Despite this linguistic wrangling, Lamancusa is keen to emphasize that geopolitical turmoil isn't necessarily causing a reduction in ESG efforts. "If anything, we're seeing the opposite," he confirms.

Increases in sustainability projects

"The PSC has observed a 500% increase in the number of sustainability-related projects with our members this year compared to last," Lamancusa continues. "For example, we've seen companies such as Tuffy's, Earth Animal, Morris Packaging, Petcurean and Champion conduct Materiality Assessments to help them focus on the areas of sustainability that are most important to their business."

▶ SEE NEXT PAGE

Other businesses are focusing on emissions. "We've also seen our members such as Company of Animals, Bimini Pet Health and Moderna conduct greenhouse gas accounting projects to understand their emissions and chart a path towards reduction," he continues.

Driven by consumers

Lamancusa highlights that consumer behavior remains a key driver for companies to prioritize sustainability work. He mentions a recent *Harvard Business Review* article which revealed that Amazon products labeled as sustainable via programs such as Climate Pledge Friendly see about a 13% lift in demand during the first 8 weeks after adding the certification.

"This statistic speaks volumes: it shows that consumers reward verified sustainability claims and that credible ESG signaling directly translates to business value, even in volatile times," he says.

ESG trendsetters

Lamancusa and his team at PSC recently launched a new solution designed to track ESG progress in pet food: the Annual PSC Benchmark. In the first 3 months following the launch, 25% of PSC's membership did the evaluation.

"A really positive sign is that companies are using the results to help them focus on specific areas for their sustainability initiatives. Because sustainability can be such a broad subject, gaining focus and setting targets is often the most important first step," he adds.

When asked who the pioneers in ESG work for the pet food sector are, Lamancusa reels off such a long list of trailblazers there simply isn't space to include them all. But interestingly, they are all small- to medium-size businesses – in other words, it's those without enormous ESG budgets that are making the most difference.



Focusing on the bigger picture, Lamancusa observes: "These pioneering players are not only advancing sustainability within their own operations but are also helping to shift expectations across the entire industry."

Battling headwinds

Another person keeping a close eye on the entire industry is Gerald Kühr, CEO of European pet food manufacturer, Partner in Pet Food (PPF). "The current geopolitical turbulence is undoubtedly creating headwinds for ESG efforts across industries, including pet food," he comments.

"From supply chain disruptions to inflationary pressures and shifting regulatory landscapes, the challenges are real and evolving. In the US, sustainability initiatives are facing increased scrutiny, while in the EU, the proposed Omnibus legislation signals a potential rollback in sustainability reporting and due diligence requirements," adds Kühr.

Doubling down on sustainability

These observations have prompted him to double down on PPF's own approach to sustainability and prioritize it to such a degree that the company becomes somewhat protected against external turbulence. In an apt illustration of this, PPF recently announced the start-up phase of a photovoltaic power plant project at its Veselí nad Lužnící site in the Czech Republic.

"Our commitment to sustainability remains unwavering. For us, ESG is not just a strategy, it is part of our identity," Kühr explains. "We continue to embed sustainability throughout our operations, driving responsible innovation and long-term value for all stakeholders, regardless of external pressures."

Robust framework

Efforts in ensuring traceability and ethical sourcing are other examples of PPF's focus. "We've built a robust framework of sourcing policies and compliance tools to guide responsible procurement across our supply chain. In 2024, we took a significant step forward by updating our Supplier Code of Conduct and Sustainable Sourcing Policy," outlines Kühr.

"These updates reflect the latest industry standards and the evolving expectations of our stakeholders.

Amazon products labeled as sustainable via programs such as Climate Pledge Friendly see about a 13% lift in demand during the first 8 weeks after adding the certification.

By year's end, 89% of our direct suppliers – by value – had formally embraced the new policy, underscoring our shared commitment to sustainability," he continues.

Reinforcing resilience

PPF also has an internal version of an ESG strategy, called 'PETS'. While this strategy has long been the cornerstone of PPF's sustainability journey, the company recently took intentional steps to evolve it in response to today's increasing geopolitical and regulatory complexity.

Kühr says: "In preparation for the EU's Corporate Sustainability Reporting Directive (CSRD), we conducted a double materiality assessment (DMA) to identify and prioritize the ESG topics most critical to our business and stakeholders. Our revised strategy reinforces our resilience and ensures we remain aligned with stakeholder expectations, even in a challenging geopolitical landscape."

All together now

As a global player with the company motto 'Working Together for a Planet of Plenty', US animal feed company Alltech is well placed to comment on the importance of cooperation for the greater good, including during challenging times.

Tara McCarthy, the company's Global VP of ESG, observes that tangible change for the better tends to come from the top. "Policy and regulation play a huge role in shaping industry's responses to its commercial environment," she says. "Our own research found that the top 3 influences on sustainability – in order – are government policy, regulation and the consumer."

Dealing with regulatory delays

McCarthy explains that shifting sands on the regulatory front are proving challenging but also generating some positive outcomes: "Recent policy and regulation shifts – for example, delays in the implementation of the EU Deforestation Regulation (EUDR) and the CSRD – have been viewed with a mixture of relief by some and disappointment by others."

She adds that: "The delay has, however, provided an opportunity to build more complete and robust responses for industry. The strong messaging from policymakers to reassure affected actors that the goalposts have not changed is an important one."

The importance of collaboration

So, how is Alltech evolving its own sustainability strategy as regulatory and political backdrops change? "We regularly undertake reviews of the context in which we operate," notes McCarthy.

"Tangible drivers of our current strategy are the dual focus on data-driven proof points and a producer-centric mindset. Alltech remains steadfast in its commitment to the vision in our company motto, ensuring our sustainability reporting is robust and our alignment to relevant regulation proactive," she continues.

On the importance of collaboration, McCarthy comments: "Supporting our pet sector customers in making measurable impact is key, particularly to mitigate any greenwashing risks. For example, we have continued to provide verified Life Cycle Assessments (LCAs) on a growing range of our products to support our customers in their ESG data collection and impact journey."

Reasons for optimism

Although concrete data is sketchy, it appears that some companies are choosing to invest in projects related to secure sourcing and building in resilience, rather than sustainability projects such as carbon footprint reduction. It is too early to determine the long-term effects of this.

Nevertheless, despite the unprecedented degree of uncertainty across the sector, there are reasons to be cheerful, as highlighted above. Whether by analyzing and benchmarking their ESG performance, doubling down on sustainability or intensifying collaboration, many companies throughout the pet food supply chain are still striving to create a fairer, greener and more resilient future. ◆

Has junior pet food hit a ceiling?

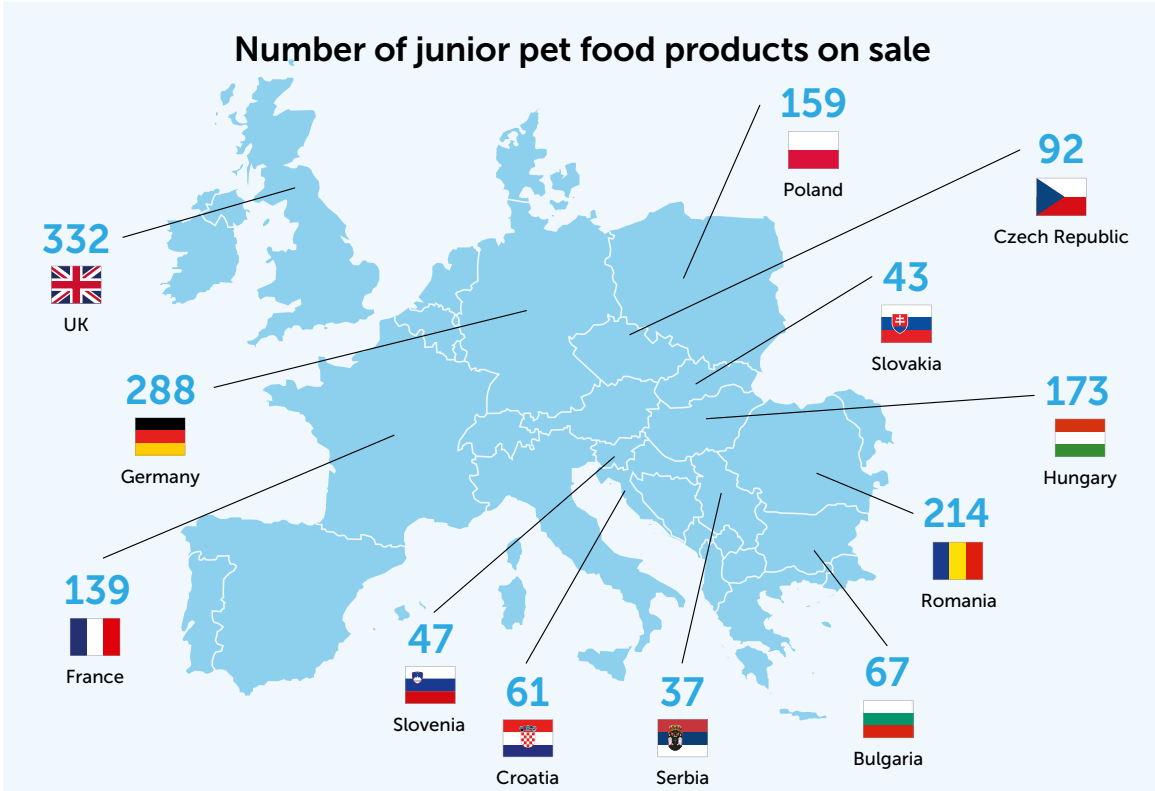
Puppy and kitten products – both dry and wet – seem to have claimed all available shelf space, even in developing markets. Is there still room for growth?



Andrea Deitert
Global Insight Lead Pet Care
NielsenIQ



Aldona Padula
Regional Insight Lead Pet Care
NielsenIQ



Source: NielsenIQ, count of products selling at least €1,000 in the period July 2024-July 2025

The shift in how people relate to their pets, with an increasing emotional bond and the responsibility that comes with that, has been reshaping the pet care industry for some time now – especially in the pet food aisle.

Market saturation

In response to the shift from pet owner to pet parent, manufacturers have been expanding their offerings for the youngest pets in recent years. In Europe, the market is now saturated. Although new, innovative junior pet products have been launched in 2025, there is a stagnation in terms of the number of items on the shelves.

Junior dry dog food decline

US pet parents contribute to more than half of global junior pet food value (-8% value sales year on year) while European markets (-1% value sales) generate around 25% of the global sales in this category. The sales dynamics are similar in both regions, with junior dry dog food as the main driver of the decline. The impact is more pronounced in the US, however, where this segment holds greater weight.

Over 60% of US junior pet food value comes from dry dog food – the segment is worth over $1 billion (€860M) annually – compared to just 30% in Europe, with an annual value of over $200 million (€172M). As a result, the downturn in the junior dog dry segment has a stronger effect on overall junior pet food performance in the US market.

The dynamics in both regions when it comes to junior cat food are similar: while junior cat dry food is showing steady performance, junior cat wet sales have noted 9% growth in the US and 5% growth in Europe year on year.

Following veterinary advice – or not

Vets consistently recommend feeding junior pets with life-stage-specific formulas: foods that are richer in calories, protein and fat, and are fortified with essential

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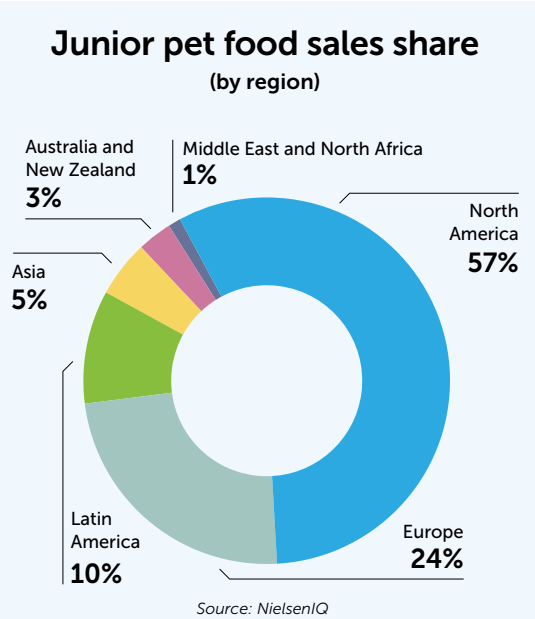
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nutrients like DHA to support healthy development and strong immunity. These specialized diets are advised until pets reach around 12 months of age.

While pet ownership is on the rise for cats and stable for dogs, the volume of junior pet food sales is failing to keep pace. This disconnect suggests that many pet (especially dog) parents may be skipping age-specific nutrition and feeding their young pets adult food. But why is there a gap between recommendations and behavior?

Much like human parenting, pet parenting comes with a flood of conflicting advice and anecdotal experiences that can easily cloud judgment. Add to that marketing buzzwords like 'grain-free' or 'natural,' and it's easy to see how pet parents can be swayed by what sounds good rather than what's nutritionally appropriate.

There is a common belief that adult food is 'good enough' for kittens and puppies, despite the very different nutritional needs of growing pets.

Price as a barrier

Junior pet food, especially junior dog food, is significantly more expensive so price concerns could be a factor in sales decline. On average across European markets, puppy-specific wet meals are priced 53% higher – at $4.25 (€3.66) per kg – than standard adult dog food, at $2.80 (€2.41) per kg. Dry puppy food is 90% more expensive – on average priced similarly to puppy wet food – at $4.30 (€3.70) per kg, while adult dry costs on average just $2.30 (€1.98) per kg.

The price gap is less pronounced for cats: wet kitten meals cost approximately 21% more than adult equivalents – $5.75 (€4.95) per kg vs adult $4.80 (€4.13) per kg – and dry kitten food is 46% more expensive – $5.80 (€4.99) per kg vs $4 (€3.44) for adult cat dry food.

Examining segment shifts

Interestingly, there are signs of growing awareness. This is indicated by a small but increasing number of pet parents actually buying into junior food within the 3 biggest markets in Europe – France, the UK and Germany. On average, 20-25% of cat parents are purchasing kitten food but only 10-15% of dog parents buy puppy food.

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As junior pet food volumes remain flat in developed markets such as the UK, Germany, France and the Nordics, there is notable growth in Southern and Eastern Europe.



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The junior cat wet premium segment stands out as the fastest-growing area, with both niche and major brands performing exceptionally well.

Pet parents generally spend up to 50% more on puppy food than on kitten food depending on the country. While cat food buyers spend the least each month per pet parent on kitten food in Germany – around €21 ($24) – and the highest in the UK – around £42 (€49/$56) – this doubles when looking at puppy food. In France, for example, owners of young dogs could actually spend up to €62 ($72) each month.

The junior dry food segment – nearly twice the size of the wet segment in both value and volume – is now in decline. The shift may reflect a move toward wet food, as vets often recommend this as a bigger part of a mixed feeding approach. While not all pet parents may follow veterinary guidelines, those who do seem to compose more balanced menus, with a greater emphasis on wet food.

Around half of the pet food brands on sale in Europe include products specifically designed for young pets in their portfolios. This year, large premium brands have seen the strongest sales growth. Smaller brands with premium positioning are also gaining traction, outpacing many mainstream competitors.

This trend is especially clear in the kitten segment, where private label offerings are losing ground while premium products from leading brands are the ones driving category growth.

Differences in European markets

Meanwhile, as junior pet food volumes remain flat in developed markets such as the UK, Germany, France and the Nordics, there is notable growth in Southern and Eastern Europe.

Countries including Poland, Romania and the Czech Republic have recorded the most significant increases in this segment, driven by wet food. Importantly, growth is not attributed to a broader product assortment, but rather to higher product rotation, indicating stronger consumer uptake of existing offerings.

There has been a continuous slight decline of dog food (across all life stages) for over a year now, but dry food for puppies is experiencing double-digit volume declines across nearly all European markets, with the exception of Poland, where the category noted a 4% year-on-year volume increase.

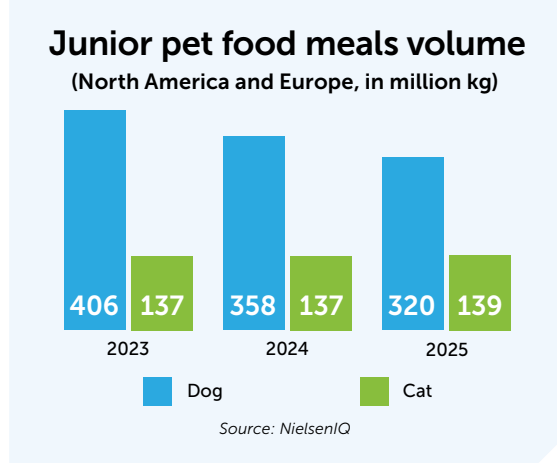
Educating new pet parents

Even though the junior pet food segment is relatively small, it creates the pet owner's first point of contact with a brand. So early recruitment is the perfect time to enter a pet parent's purchase routine and is a way to help build long-term brand loyalty.

While only about half of brands are currently offering junior products for young pets, it doesn't necessarily make launching new products any easier, especially since there's little to no growth in the number of items available across Europe.

That said, the junior cat wet premium segment really stands out as the fastest-growing area, with both niche and major brands performing exceptionally well.

When launching new junior products for young pets, it's crucial to focus on education and clear communication. There's still room to grow in this space, especially with new pet parents who are just starting to form their shopping habits. By guiding them early on, brands have a real opportunity to shape long-term preferences and build loyalty. ◆





Toy trends among puppy and kitten owners

Fresh consumer data reveals generational behavior insights, offering possible strategic directions for both retailers and brands.



Diana Dominguez
Business Reporter
GlobalPETS

Young cats and dogs remain a popular choice among today's pet parents. A survey commissioned by PETS International, and conducted by Loop, reveals how age, gender and regional factors influence ownership trends, purchasing habits and attitudes toward pet toys.

Younger pets, younger owners

Almost 2,000 pet parents from the UK, France, the US, Canada, Brazil and Mexico responded to this summer's survey. Of these, 223 own kittens and 814 are puppy owners. Loop data shows that the older the owner, the less interest they have in young pets.

Gen Z respondents (aged 18-28) report the highest ownership of both puppies and kittens, with millennials (aged 29-44) following closely behind.

According to the data, older pet owners such as Gen X and baby boomers have a stronger preference for adult and senior dogs. This trend may suggest that older owners prefer pets that match their lifestyle, as younger pets typically require more attention, training and physical activity.

Globally, individuals with young pets show a strong preference for puppies compared to kittens. This is particularly the case in Canada and the US. Interestingly, the majority of puppy and kitten owners are women – 86% of puppy owners and 87% of kitten owners.



Frequent buyers

When it comes to buying pet toys, the survey shows another gap between kitten and puppy owners. Of the latter, 17% have bought pet toys more than 6 times this year, while some 25% of kitten owners have done the same.

Interestingly, fewer owners of adult and senior cats and dogs have bought toys more than 6 times this year, with no more than 14% of the respondents in these categories saying that they have done so.

Looking at the data compared to the whole of 2024, the figures for the first half of this year might indicate a considerable drop in purchases for puppies, and a large rise in toys bought for kittens.

Expenditure trends

In terms of spending power, the majority of puppy and kitten owners chose to spend up to $49 (€42) on pet toys last year. Among puppy owners, 75% fall within this lower range, while 66% of kitten owners do the same. The remainder opted to spend in higher brackets, ranging from $50 (€43) to $100 (€86) or more.

Owners of older cats and dogs are even more likely to spend less money on toys, with as many as 95% of adult dog owners and 85% of senior cat owners buying toys for their pets within the lower price ranges.

Over the next 12 months, 17% of puppy owners plan to spend less on pet toys, while 14% intend to spend more. Among kitten owners it is a very similar picture, with 21% planning to spend less and 17% planning to spend more.

Consumer purchasing behavior

For puppy owners, the majority (68%) buy pet toys from online retailers such as Amazon, while 66% buy from pet specialty stores and 46% buy from discounters such as Target and Walmart. About a third (34%) also opt to buy from supermarkets while over a quarter (26%) buy from independent or local stores, and some 12% buy from veterinary clinics.

▶ SEE NEXT PAGE

17% of puppy owners have bought pet toys more than 6 times this year, while some 25% of kitten owners have done the same.

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Where do owners of young pets prefer to buy toys?*

(Kitten owners vs puppy owners in %)



Source: Loop-PETS International, July 2025, (n= 1,029) in UK, France, US, Canada, Brazil and Mexico.
**Multiple responses allowed*

Kitten owners have similar preferences for their pet purchases, with pet specialty stores as their favorite (62%), followed by online retailers (59%), discounters (45%), supermarkets (39%), independent or local stores (27%) and veterinary clinics (11%).

Owners of adult and senior cats tend to do slightly more online purchasing (67%-68%) than kitten owners, while owners of adult and senior dogs do their toy purchasing much more frequently in supermarkets (63%-51%) than puppy owners.

Influential factors

In terms of product influence, both puppy and kitten owners put their trust in product reviews. Other prominent influential factors include packaging and design, peer recommendations and social media. However, more than a third of them are not loyal to any brands and cite availability and price as key reasons for purchasing.

When puppy and kitten owners buy pet toys, the most important factors are product safety (71% and 72% respectively) and price (69% and 73%). Interestingly, 6 in 10 puppy owners and 65% of kitten owners prefer pet toys made of rope, although they both also like to buy toys made of fabric (64% and 59%) and eco-friendly materials (56% and 57%).

Pet wellbeing

To ensure their pets' safety, puppy and kitten owners tend to avoid laser toys (28% and 33% respectively), string toys (24% and 21%) and feather toys (20% and 21%). The most commonly cited concerns include choking hazards (76% and 80%), the risk of ingestion of parts (78% and 76%) and sharp or dangerous components (56% and 62%).

Pet toys can also offer a wide range of developmental, physical and emotional benefits, according to both puppy and kitten owners. Most respondents say that toys help relieve boredom (92% and 89% respectively) and encourage physical activity (88% and 86%).

Mental stimulation is seen as another key benefit, cited by 74% of puppy owners and 77% of kitten owners.

Toys are also credited with easing separation anxiety (39% of puppies and 47% of kittens), redirecting destructive behavior (47% and 61%) and supporting dental health through safe chewing (27% and 30%). ◆

When puppy and kitten owners buy pet toys, the most important factors are product safety and price.

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