



PETS International

THE GO-TO PUBLICATION FOR PET INDUSTRY PROFESSIONALS SINCE 1988

FEB 2025

TREND REPORT

PRIME CUTS: HOW CULTURED MEAT IS MAKING HEADWAY

SUSTAINABILITY GOALS

Recycling byproducts,
CSR & working
towards zero waste

SPOTLIGHT ON US, UK & AUSTRALIA

The latest data
and analysis

BUSINESS OUTLOOK

Tracking and
predicting
M&A activity





QDS®
BAKE



DRY & COOK & BAKE SOLUTIONS



- **New All-in-One technology:**
Dehydrating, cooking and baking by forced convection
- **Acceleration of Innovation:**
Allows to develop new foods and treats for pets
- **Great Versatility:**
Possibility to dry & cook & bake any type of product and format
- **Process Optimization:**
Continuous system, with superior performance and lower energy consumption
- **Full Connectivity 4.0:**
Full control of the process

8

What's on the label?

A survey by PETS International and Yummypets provides insights into what consumers think about how information is presented on pet food labels.



45

A little something extra

How meal enhancers such as toppers and broths are building a small but important share in the US pet market.



40

Supplementary data

New research considers the hows and the whys of vitamin and supplement purchases for pets in the US.



Closed for business

As a New York state restriction on retail pet sales comes into force, pet shops are looking for ways to diversify.

50



56

Country report: Australia

From ownership stats to business dealings, a closer look at the landscape of the pet sector 'Down Under'.



And more:

Regulations bringing change to pet food packaging	13
The potential of eggshell membrane for pet nutrition	28
Exploring how coatings affect extruded food	30
Do the UK's pets have a weight problem?	55
Cat accessories just got smarter	60
How pet accessory retailers must adapt	63



ZOOMARK

5-7 May 2025
BolognaFiere, Italy

Hall 22

Booth B54

Meet us there!

Pet Foodie

Real meat, Real joy

Frozen fresh meat for dogs and cats

- Easy to serve
- Quickly defrosted
- No nasties



q-petfood.com

Embracing the year ahead

We begin 2025 with positive expectations, particularly regarding investments in our industry. January has already shown an uptick in activity and forecasts suggest that the sector is gearing up to gather even more momentum in the coming months, following a year of slower activity.

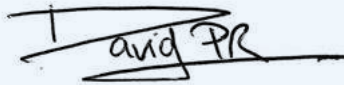
In this issue, we explore how investor appetite is expected to evolve this year, while analyzing the emerging categories capturing particular attention.

One example is the cultivated meat space, with new players on the scene launching products this month – driven by the surging demand for alternative proteins in the human food industry. In fact, a recent survey from think tank The Good Food Institute revealed that 45% of US consumers would be likely to try a product based on meat alternatives.

Sustainability is set to remain a defining force this year, driving pet businesses to adopt ever more responsible practices. We dive into the state of corporate social responsibility (CSR) initiatives and zero-waste goals within the pet sector.

One thing is clear: being an environmentally conscious business is no longer just an aspiration – it requires actions that resonate with consumers.

Wishing you an inspiring read,



David Palacios Rubio
Editor-in-Chief



“The future belongs to those who believe in the beauty of their dreams.”

ELEANOR ROOSEVELT, US FIRST LADY 1933-45, DIPLOMAT AND ACTIVIST

 **PETS International**
part of  **GlobalPETS**

Intermedium Publishers BV
Newtonstraat 3
1098GX Amsterdam (NL)

+31-33-4225833
content@pets.nl

Editorial team

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

© Copyright 2025, Intermedium Publishers BV.
All rights reserved.

While we, as the publisher, aim for accuracy and completeness in the information and statistics presented, we cannot guarantee that. We cannot be held liable for any use of this information. The publisher is not responsible for the content of advertisements or sponsored editorial.

globalpetindustry.com



Don't miss out on key updates in the dynamic pet industry!

Subscribe to our newsletter at globalpetindustry.com, or just scan this QR code for an easy sign-up process.



Major acquisitions bolster global pet business

Tennessee-based rural lifestyle superstore **Tractor Supply Company** has closed the acquisition of Allivet, a major US veterinary pharmaceutical industry player.

The purchase will expand the company's addressable market by \$15 billion (€14.5B) to \$225 billion (€218B).

German pet retailer **Fressnapf**, meanwhile, has acquired Italian pet business Arcaplanet after final approval by the European Commission. British private equity firm Cinven, which acquired a majority stake in Arcaplanet in 2022, joined Fressnapf as a strategic partner.

As part of its European expansion strategy, Nordic pet player **Musti Group** has completed its €18.2 million (\$19.2M) acquisition of Pet City, bringing the Baltic company's 46 retail stores, 16 veterinary clinics and e-commerce platform into the Musti Group fold.

"I'm extremely excited about what we can achieve together in the growing Baltic market as we share best practices between the Nordic and the Baltic markets," says Musti Group CEO David Rönnerberg.

Musti Group's Norwegian subsidiary has also announced the purchase of 40% of Petrus Veterinærer, a veterinary company in Norway that operates 2 vet clinics in Oslo.

The packaging sector has also seen movement as European packaging company **Coveris** has completed its takeover of Czech producer of self-adhesive labels, S&K Label.

General Mills eyes Chinese expansion as it beefs up pet portfolio

Pet food manufacturer General Mills is pushing its pet products in China with plans to expand its portfolio further.

The food multinational first began sales in China in the 1990s, but pet food has only been part of its Chinese portfolio since 2021. However, any expansion in the market will face growing competition, as China's capacity for pet food production has increased in recent years.

General Mills has recently focused on its pet food portfolio, as the sector has seen declining sales in recent months. To expand its selection of pet food brands, the company recently bought the Tiki Pets and Cloud Star brands, which are known for their high-quality treats, dry food and wet food. Together, the two brands generate \$24 billion (€22.7B) in revenue.



Pets at Home remains confident despite losses

Pets at Home has maintained its profit guidance after releasing its trading statement for Q3 of the financial year (FY) 2025.

Overall revenue declined by 0.2% to £361.6 million (\$449.5M/€431.1M), with like-for-like (LFL) revenue down by 1%. Retail revenue dropped by 2.4% and LFL retail revenue declined by 2.8%, with the company blaming a challenging UK retail environment during the quarter.

Just Eat boosts its on-demand delivery service for pet supplies in the UK

Online delivery platform Just Eat has recently partnered with British pet retailer chain Just for Pets to deliver pet care essentials, including food, treats, grooming products and toys, in 30 minutes or less.

The company recognizes this as the first “large-scale collaboration” between an on-demand delivery platform and a pet retailer. It has launched the service with 18 Just for Pets locations, with plans to expand to its sister brand, Pets & Friends.

The delivery platform has also formed partnerships with pet retailers Fressnapf and MaxiZoo in Austria and Switzerland.

“Pet care is a key part of our retail strategy, and we aim to expand this vertical across all of our Just Eat markets,” a company spokesperson tells PETS International.



Italy confirms higher tax on pet litter

Italy’s Revenue Agency has clarified its Value Added Tax (VAT) rules for pet litter products in a resolution issued in December with plant-based pet litter now subject to Italy’s 22% VAT – ending an ambiguity that created loopholes for manufacturers.

The Revenue Agency’s ruling came just months after industry players pushed to reduce Italy’s VAT for a host of other pet supplies.

Advocates recently brought a bill to the Chamber of Deputies proposing a decrease in the VAT for pet food and veterinary supplies to 10%. A similar effort to lower VAT on pet goods is being made in Portugal.

Japanese pet parents keen to bring their pets on vacation

A survey by Japanese pet food brand CoCo Gourmet of 1,021 dog owners in October 2024 revealed that nearly all (96.3%) wanted to travel with their pets – an increase of 3.3% since 2022.

Additionally, the percentage of Japanese pet owners who have already traveled with their dogs jumped from 70% to 82%.

Despite rising travel expenses, 84.5% of respondents indicated a strong commitment to continuing to plan pet-inclusive trips. Spending on pets during travel has also increased, with the proportion of owners spending over JPY10,000 (\$65.03/€61.98) per trip growing from 37.9% to 50.6%.



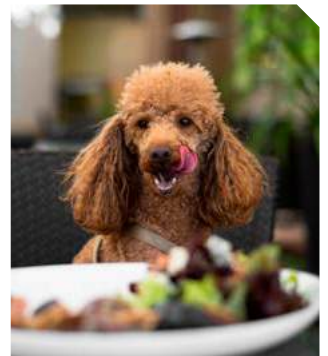
Singapore eases food license rules for pet-friendly outdoor dining

Singapore’s Food Agency (SFA) has simplified its licensing framework, allowing retail food businesses to welcome pets to their outdoor refreshment areas (ORAs) without requiring additional approvals, provided they do not serve pet food.

SFA’s move highlights the low risk of zoonotic transmission in ORAs and aims to address food safety concerns while fostering a pro-enterprise regulatory environment.

However, the body still cautions operators to adopt hygiene practices, such as clear signage, accessible hand wash facilities and sanitation spots to prevent cross-contamination.

At least 120 food businesses across the island country are believed to be eligible to benefit from the update.



Canada updates import rules for Thai pet food

The Canadian Food Inspection Agency (CFIA) has updated its import regulations for Thai pet food products, with the aim of streamlining the importation process and reducing delays.

Under the new requirements, Thailand's Department of Livestock Development (DLD) will complete a single Annex 1 facility covering all exports from a single facility for 12 months instead of requiring a fresh questionnaire for each shipment.



This adjustment means the DLD will inspect each Thai facility at least once a year. The agency has restricted the granting of fresh approvals to facilities exporting treats, kibble, freeze-dried food and pet supplements until further notice.

Canada has also introduced the standardization of import permits for canned or hermetically sealed pet food to "reduce the risk of error".

Central Garden & Pet expects to 'bottom out' in 2025 as CEO hints at new acquisitions

Central Garden & Pet's losses are likely to slow in 2025, CEO Niko Lahanas said at a recent KeyBank Consumer Spotlight.

After a weak Q4, Lahanas expects profits to return in late 2025 or in 2026. For the full financial year (FY) 2024, the company's pet segment posted a 2% year-on-year (YoY) decline in net sales, totaling \$1.83 billion (€1.74B).

Lahanas blames industry headwinds and a slowdown in live animal sales for the company's recent weak numbers. The US company is also struggling to compete with large Chinese cut-price e-commerce retailers like Shein and Temu.



However, he also notes that mergers and acquisitions (M&A), which have driven the company's growth in the past, may get easier in 2025: "We're pretty excited about... a new administration in DC, and hopefully [with] a more M&A friendly environment, we'll see a lot more deal flow."

Major players look to consolidate positions in European pet markets

Bulgarian pet retailer Petmall is merging with its distributor, Petfoodtrade, to form one entity to improve efficiency in the local pet market.

The combined operation has a projected revenue of лв26 million (\$13.7M/€13.3M) in 2025 and over лв32 million (\$16.9M/€16.4M) in 2026.

Petmall operates 16 bricks-and-mortar stores nationwide and is the country's largest online pet supply shop.

"The unified company is well-positioned to lead the Bulgarian pet industry and explore opportunities for international expansion," says Petmall CEO Nikola Ninov.

Also in Eastern Europe, with the Bosnian local pet food market projected to grow by 6% annually and reach \$52.4 million (€51.2M) by 2029, Sarajevo-based pet store chain Pet City aims to expand its footprint to 30 locations by 2027.

The retailer, which is investing €1.4 million (\$1.48M) into expanding its market reach, plans to open 5 additional stores by 2026 across Central Bosnia and the Republic of Srpska.

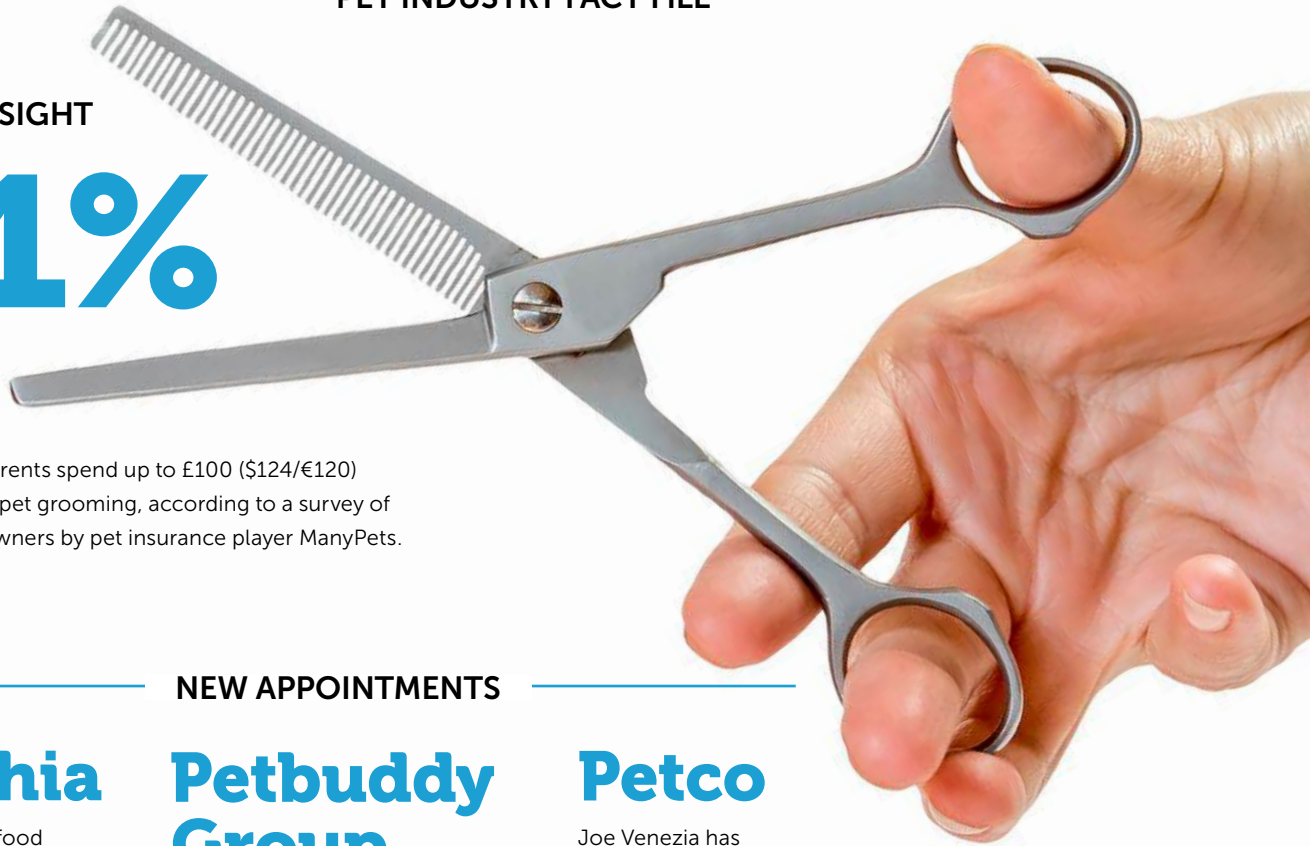


Meanwhile, Stockholm-based Pet Pawr Group (PPG) has merged with Norwegian retailer PetXL Group, solidifying its position as the second largest pet retailer in the Nordic region with a combined turnover of SEK 1.1 billion (\$100M/€95.1M).

DATA INSIGHT

61%

of UK pet parents spend up to £100 (\$124/€120) a month on pet grooming, according to a survey of 2,000 pet owners by pet insurance player ManyPets.



NEW APPOINTMENTS

Alpha

The US pet food manufacturer has appointed Cody Risner as Vice President of Operations.

Petbuddy Group

Paul van der Raad, previously of Protix, has joined the sustainable Swedish pet care company as CEO.

Petco

Joe Venezia has been selected for the newly created role of Chief Revenue Officer.

TOP WEB NEWS

Is Zooplus considering sale?

The private equity owners of the e-commerce pet retailer are reportedly looking to sell the business, but the company's profit projections have declined.

TOP 3 INVESTMENTS

Food tech firm JBT has taken over Icelandic competitor Marel, current owner of Wenger.

Belgian bird food manufacturer Versele-Laga has acquired Barcelona-based Psittacus Catalonia.

German business AlphaPet Ventures has acquired JR Pet Products, a Welsh treat manufacturer.



LATEST NEWS





Always read the label?

Survey reveals consumers have issues with how pet food is described

Over the past few years, the information provided on pet food labels has evolved significantly, driven by a demand for transparency and detailed product information. Can research tell us how manufacturers might best address customer doubts?



Paula Flores
Contributor
PETS International

A recent survey by PETS International and Yummypets of more than 800 pet parents in the US, Canada, the UK and France reveals that 6 out of 10 pet owners say accurate and transparent labeling is very important. The findings provide manufacturers with insight into opportunities for improvements.

Not just a legal requirement

Regulations require labels to contain essential details such as product name, ingredients, nutrient levels, additives, best before dates, batch codes, producer contact information, feeding instructions and weight. In a competitive industry such as pet food, labeling that is clear, accurate and transparent is not only a legal requirement – it is also essential for building trust and loyalty.

According to the European pet food industry federation FEDIAF, the primary purpose of a label is “to support informed purchasing decisions by providing clear, concise and truthful information on the product’s composition, characteristics and use”. The research findings show that most purchasers agree with this, but a minority are not confident they understand the information they are given.

Accuracy and transparency in a pet food label is very important or somewhat important for 88% of the respondents when they are choosing a product. Almost 60% find transparency very important, with US consumers feeling particularly strongly about it (68%), compared to those in other countries.

▶ SEE NEXT PAGE

What a label really says

When it comes to interpreting pet food labels, 79% of the respondents feel at least somewhat confident in understanding the information provided, suggesting that many consumers believe they can navigate claims and ingredient lists. Yet, 20% of pet parents admit uncertainty about what they are actually feeding their pets.

French consumers are the least likely to feel very confident about understanding a label (14%), whereas US consumers are the most confident (34%). Interestingly, men (35%) are also far more likely to feel confident than women (21%). Consumers aged 35-44 (36%) also display higher confidence levels than other age groups.

Skepticism rather than trust

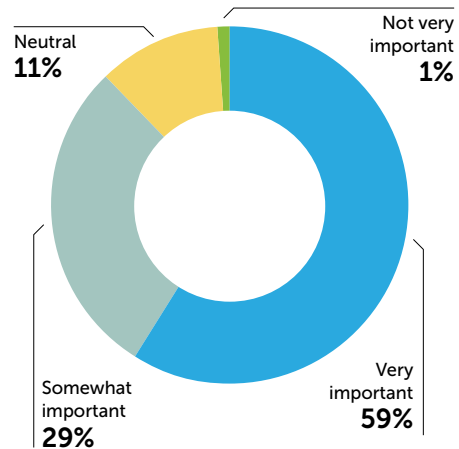
One of the most striking findings of the research is what seems to be a disconnect between consumer understanding and their actual trust in pet food labeling. A majority of respondents (58%) to the PETS International and Yummypets survey believe that pet food labels are misleading, with French pet owners distrusting them the most (68%).

Claims such as 'grain-free', 'human-grade' and 'sustainably sourced' are prominent on many products, reflecting trends in premiumization and health-conscious buying. Sustainability has also influenced labeling, with many brands emphasizing eco-friendly claims, recyclable packaging and certifications such as organic or MSC (Marine Stewardship Council).

As many as 4 out of 10 pet parents find marketing claims such as 'natural' or 'premium' on pet food misleading. Nutritional claims (31%), ingredient lists (29%) and even the images on packaging (20%) are also identified as sources of confusion. Nutritional claims are particularly relevant for Canadian consumers (39%), whereas ethical and environmental claims – though less prominent – raise concerns among 16% of consumers.

Leveraging QR codes to provide detailed and easily accessible information can make them a more meaningful resource.

"How important is accurate and transparent labeling to you when choosing pet food?"



Source: Yummypets-PETS International, September 2024
(n= 827) in US, Canada, UK and France

This skepticism about pet food claims may indicate a need for brands to re-evaluate their labeling strategies. The answer could be in simplifying labeling language. Information on the packaging should only provide honest and transparent explanations that empower pet consumers to make informed choices.

QR codes: a missed opportunity?

Technological advances have also shaped labeling trends. QR codes, in particular, are increasingly used to provide extra information. This includes transparency around sourcing and traceability, as well as data regarding the environmental impact of a product. Nevertheless, the survey findings reveal a mixed consumer reception.

Globally, just under a half (46%) of respondents to the survey have noticed this new technology on pet food labels. As many as 6 out of 10 US pet parents are familiar with it, but French pet parents are the least likely to find QR codes on pet food labels (36%),

followed by Canadian (43%) and UK (44%) respondents. Additionally, 54% of the respondents say they have never scanned QR codes. Unsurprisingly, younger pet owners are more adept in using this technology – with 60% of them having scanned QR codes – compared to the over-65 age group, where the proportion drops to an unimpressive 9%.

Despite the awareness levels, 6 in 10 pet owners are positive about QR codes, nearly a third (32%) remain neutral on this, and less than 1 in 10 (8%) view them negatively. Again, it is the younger pet owners (25-34-year-olds) who are the most positive about the technology (34%).

More access to detailed information

The type of information that consumers want and expect from these digital tools is clear: detailed and accessible information that addresses their primary concerns for their pet’s nutrition. This translates as nutritional analysis – 63% of respondents – closely followed by detailed ingredient sourcing (59%), although this is less relevant for UK consumers (48%). Information about product recalls and safety are also considered important (39%), particularly for US pet owners (48%).

The manufacturing process proves to be particularly relevant for French pet owners (44% versus 28% in the UK). More than a third of the respondents want to see claims or certifications, particularly those in the 25-44 age group, revealing a strong preference for transparency at every stage of production.

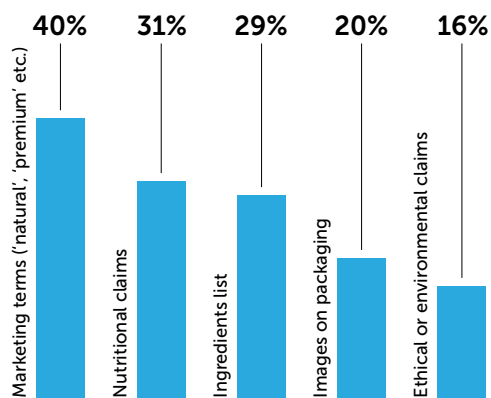
Serving suggestions are mostly appreciated by Canadian pet parents (41%), with French consumers the least likely (8%) to appreciate them.

Future best practices

For pet food manufacturers and retailers, simplifying and clarifying labeling language is of vital importance. Leveraging QR codes to provide detailed and easily accessible information can make them a more meaningful resource, giving the transparency that consumers demand without the packaging itself becoming too cluttered.

As the pet food sector continues to evolve, so do consumer demands for honesty and openness. By prioritizing clear communication, as well as embracing innovative labeling practices, brands can not only meet these demands, but also build lasting trust with their customers. ♦

“What do you specifically find misleading on pet food labels?”*



Source: Yummypets-PETS International, September 2024 (n= 827) in US, Canada, UK and France
*Multiple responses to the question permitted



NEW PRODUCT

pramyp®

GOAT MILK SERIES



PREY-INSPIRED HIGH MOISTURE, HIGH PROTEIN DIET

PERFECT FOR ALL CATS, WITH A VARIETY OF FORMATS
AND FLAVORS ACROSS ALL LIFE STAGES



JELLY

GRAVY

MOUSSE

PATE

Meet us at



IF INTERESTED TO BECOME DISTRIBUTOR,

EMAIL US AT: INFO@SHAWPETGROUP.COM OR SALES@SHAWPET.COM

[f Pramycat](#) [@ Pramycat](#) www.Pramycat.com



What will the latest wave of labeling regulations mean for pet food manufacturers?

Taking stock of how regulatory changes and pressure from consumers are likely to affect pet food packaging in Australia, the US and Europe.



David Palacios Rubio
Editor-in-Chief
GlobalPETS



Ismira Lutfia Tisnadibrata
Contributor
PETS International

Pet food packaging and labeling must remain flexible and adaptable to keep up with constant innovation in ingredients and technology. Manufacturers must also meet growing consumer demands for transparency and information about their sustainability efforts. Regulatory changes are emerging in some regions aimed at ensuring this. Meanwhile, in Europe, the use of on-pack QR codes is on the rise.

Fresh legislation in Australia

In June 2024, South Australia announced plans to introduce a bill to regulate the state's marketing and labeling of pet food. The Pet Food (Marketing and Labelling) Bill aims to address gaps in consumer protection from unfair practices.

The bill also highlights the importance of providing transparency to pet owners with clear and accurate information about pet food products so they can make informed purchasing decisions aligned with their pets' health condition and wellbeing.

The new rules will also require pet food manufacturers to follow the Australian Pet Food Manufacturing and Labelling Standard (AS5812),

[▶ SEE NEXT PAGE](#)

which outlines labeling and marketing guidelines for pet food makers, sellers and marketers. The proposal is expected to be debated by the chambers of the Parliament of South Australia later this year.

"If producing pet food in South Australia, companies will need to comply with any future legislation. The bill has been developed with the intention that pet food sold into the province will also need comply," says Carolyn Macgill, Executive Officer of the Pet Food Industry Association of Australia (PFIAA), when approached by PETS International.

Adopting a nationwide approach

Additionally, all states and territories in Australia are currently discussing pet food regulations through a committee facilitated by the Department of Agriculture, Fisheries and Forestry (DAFF). In 2022, the ministry's Agriculture Senior Officials' Committee (AGSOC) set up a Pet Food Working Group to discuss several policy options around pet food safety. This includes a so-called cost/benefit analysis and mandating the AS5812 pet food labeling standard.

PETS International has learnt that the working group is currently preparing a report that will be forwarded to the agriculture authorities.

New guidelines in the US

In the US, new guidelines issued by the Association of American Feed Control Officials (AAFCO) have implemented new-style labels on the packaging of pet food products, including treats and nutritional supplements. Pet players will need to reformat the Nutrition Facts box to look more like the one on human food packaging. The label must also display a 'product purpose' statement, including details of which type of animal the product is intended for.

The rules also call for modernization of the language used in the ingredient statement. One suggestion is that manufacturers could include new icons to provide consumers with visual cues about how the product should be handled and stored.

Impact and industry response

US industry body the Pet Food Institute (PFI) points out that these new rules mean each pet food manufacturer in the US will need to design new printing plates for all

In the US, pet players will need to reformat the Nutrition Facts box to look more like the one on human food packaging.

their labels. "With many pet food makers needing to do this at the same time, the industry could easily run into a logistics supply issue as the printers try to keep up with demand," comments Pat Tovey, Vice President of Scientific and Regulatory Affairs at PFI, which held several industry webinars about the new guidelines last year.

According to other industry representatives, these labeling updates for pet food products will also require new and costly laboratory methods for testing.

Transitional period

Pet food manufacturers have until December 2030 to adapt their packaging to the new rules. PFI advises each company to familiarize itself with the label changes and to develop its own transition plan based on both the packaging it has in stock and when it will be able to comply with the new label requirements.

Furthermore, PFI encourages pet players to monitor the actions of individual US states as they proceed to adopt the model regulatory language.

QR codes in Europe

The COVID-19 pandemic drove contactless customer interaction as people sought further information about certain products. The use of Quick Response (QR) codes by businesses has been on the rise ever since with a growing number of manufacturers, including those in the pet industry, adding them to product packaging.

The European Pet Food Industry Federation (FEDIAF) recognizes that such initiatives are already emerging in some segments of the pet food market. This is primarily driven by two factors: growing consumer demand for transparency and significant levels of investment in packaging-related technological advances.

"QR codes and other interactive technologies could provide a convenient way for pet owners to access further voluntary detailed product information, ingredient sourcing, and sustainability efforts," states a FEDIAF spokesperson. Despite the growing popularity of this feature on product labels, FEDIAF has not yet issued specific guidance on this matter. ◆

Is cultivated meat the future of pet food?

Following regulatory approval in the UK last year, several companies are poised to launch products featuring alternative meat proteins in the near future.



David Palacios Rubio
Editor-in-Chief
GlobalPETS News

The environmental benefits of cultured meat-based food are becoming ever clearer and now that legislative obstacles are being overcome, producers will want to use the momentum to gain a substantial share of this novel market.

Leader of the pack

In July 2024, Meatly became the first company to receive authorization from the UK government to sell its cultivated chicken nationwide. CEO Owen Ensor tells PETS International that this was the “first key step” in commercializing the product.

“The UK is enviable as a nation that sets trends, particularly when it comes to alternative proteins. Since achieving regulatory approval, we’ve seen a lot of excitement about cultivated meat for pets,” he says.

Less than a year after the UK’s Animal and Plant Health Agency gave the green light, Meatly has launched the

world’s first cultured meat dog treat in a partnership with plant-based pet food brand THE PACK. The snack is called Chick Bites.

The product is being sold for around £5 (€6/\$6) as part of a test project at a Pets at Home store in New Malden, in south-west London. This UK pet retailer invested £3.6 million (€4.3B/\$4.4B) in Meatly in 2023, with the aim of providing strategic assistance in bringing cultured meat to the market.

The path to more markets

In recent trials that Meatly has conducted in the UK, 75% of owners reported their pets enjoying the cultivated meat more than their regular diets. Despite the UK being the main focus for the London-based company, it is eager to expand its product offering to more markets.

“Regulatory approval here means that we are more likely to achieve similar approval for projects in other key markets, like North America,” says Ensor, who considers the region a “key geography” due to high pet ownership and openness to new food types.

[▶ SEE NEXT PAGE](#)

Meatly is also working on the regulatory process in Europe. "The Netherlands and Germany have shown strong support for cultivated meat and alternative proteins and would likely be the best markets to enter first in the EU," says the CEO.

Golden opportunity in the US

On the other side of the pond, the market could soon be seeing some new cultivated meat products for pets. San Francisco pet food startup Friends & Family Pet Food Company (FnF) recently partnered with biotechnology firm Novel Farms to bring a "new class" of cultivated meat-based pet food products to the US market this year.

The product will be launched in California first. "Since cultivated ingredients will inevitably sell at a premium, at least at the onset, you really can't get much better than right here in the Golden State," says FnF CEO Joshua Errett.

One of the biggest challenges that companies in the cultured meat sector are facing is price parity with traditional meat.

The company aims to show pet parents the nutritional advantage of its cultured offerings, rather than creating an alternative to what's commercially available. "To do that, we need to do some foundational work in the lab, to create something that is 10x what's currently out there," he says.

Caution reigns across Asia

Asia is also looking more closely at cultivated meat applications for pet food, but the official approach is a bit more conservative there. "Regulatory bodies are cautious by nature and are naturally looking to understand more about our approach to cell cultivation before rendering any formal judgement,"

Producing 1 kg of cultivated meat

Land use

Current
3.1 sq m

Target
2 sq m

Carbon footprint

Current
5.28 kg of CO₂

Target
3.29 kg of CO₂



Carbon footprint for producing 1 kg of beef
20-100 kg of CO₂ depending on the farming method

Source: Bene Meat Technologies life cycle assessment

How sustainable is cultivated meat?

The Czech biotech firm Bene Meat Technologies (BMT) has conducted a life cycle assessment study with the Czech Technical University in Prague to evaluate the environmental footprint of cultured meat production.

The research found that 3.1 sq m of land is required to produce 1 kg of cultivated meat, compared to significantly higher requirements for traditional livestock.

Cultured meat totals 5.28 kg of CO₂ equivalent emissions per kg. This is significantly less than beef farming, which is estimated at 20-100 kg of CO₂ equivalent emissions per kg of meat.

"We believe that this study marks a key milestone in understanding the environmental impacts of cultivated meat and confirms its potential as a sustainable source of protein," says Tomáš Kubeš, Head of Strategic Projects at BMT.

says Mihir Pershad, founder and CEO of cultivated fish manufacturer Umami Bioworks.

According to Pershad, authorities in Singapore and South Korea have published frameworks to aid companies in preparing their dossiers for review. "The South Korea process currently includes a request for data from an animal feeding study which Singapore does not require," he explains. In 2024, the company partnered with FnF to develop a cultivated fish brand to be launched this year.

Meeting consumer price expectation

One of the biggest challenges that companies in the cultured meat sector are facing is price parity with traditional meat. Ensor says that Meatly's main objective is to bring this difference down as soon as possible.

"If we can match our price with traditional meat, then it's an easy choice for consumers to switch to our meat, which has the same nutritional and health profile without the associated environmental impacts."

According to FnF's Errett, the situation is crystal clear: "If a consumer sees one chicken-based pet food for one price and a cultivated chicken-based pet food for twice that price, and there is no difference other than sustainability claims, cultivated has no future."

Finding the funding

Investment is another challenge for companies operating in the new space. Errett says this is mainly due to public sentiment in the US toward cultured meat and fish. "In my time in the category, I've been through boom-and-bust cycles of cultivated meat. I don't think anyone would disagree [when I say that] we are coming through a very low point for funding and general excitement around the technology," he concludes.

How potential investors will respond to the legal path for using cultured meat in pet food remains to be seen. In the meantime, Meatly in the UK is planning to launch a new fundraising round in the first quarter of the year so that it can scale up commercial production. ♦



Transform **BY-PRODUCTS** into **PREMIUM CHUNKS** with **DANA TECHNOLOGY'S** **Rotary Disc Texturizer**



www.dana-technology.dk
info@dana-technology.dk



Scan to watch
the RDT in action

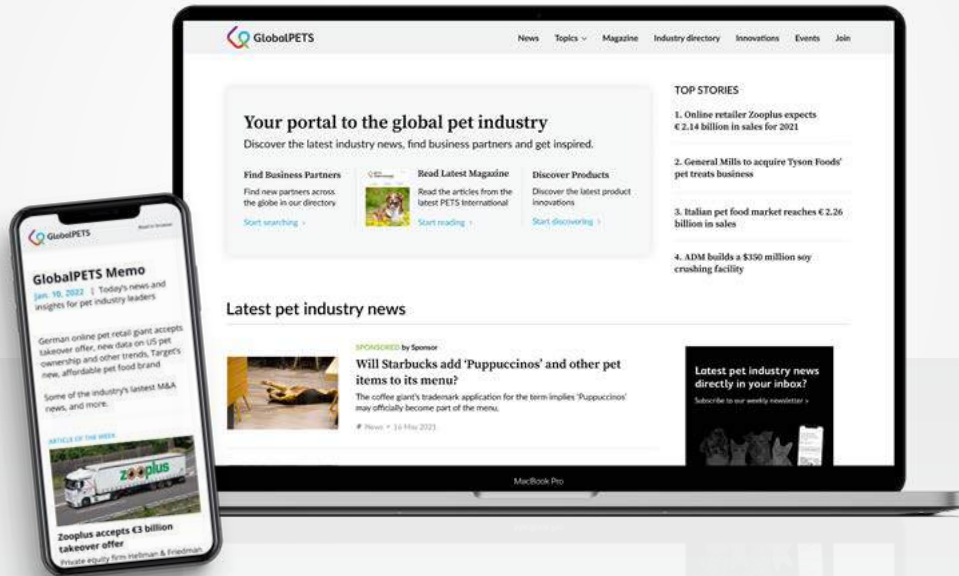
See you at:



ZOOMARK

5-7 May 2025
BolognaFiere, Italy

The latest pet industry news in your inbox?



Every week, we help pet industry professionals make sense of where the industry is going:

- ✓ The latest updates on acquisitions, investments and mergers
- ✓ Global and regional market analyses and reports
- ✓ Insights into trends, consumer behavior and expert opinion pieces

Sign up now:

www.globalpetindustry.com/newsletter



Toward a zero-waste future: a practical guide

Find out how companies can align their operations with zero-waste principles through detailed compliance measures, product innovation and actionable leadership strategies.



Gianluca Managò
Life Cycle Assessment (LCA) Consultant

Zero-waste goals are rapidly becoming a necessity for businesses across all sectors, driven by stricter regulations and shifting consumer expectations. This involves navigating the complexities of green labeling, adhering to new compliance standards and innovating in product design to minimize waste and environmental impact.

What does 'green' labeling mean?

The proliferation of green claims in marketing has heightened scrutiny of what these labels truly represent. Green labeling refers to the practice of communicating verified environmental benefits or the sustainability attributes of a product. In practice, this includes terms like 'recyclable', 'biodegradable' and 'carbon neutral', among others.

However, with new directives emerging globally, companies must move carefully. Their claims must be verifiable with proof, as well as clear and relevant to the product's entire life cycle, if they are to avoid regulatory pitfalls or accusations of greenwashing.

Key trends in labeling regulations

EU

The EU's Green Claims Directive (GCD) will require companies to substantiate environmental claims with robust evidence verified by an accredited third party. The legislation entered into force in March 2024 and must be implemented by all European countries in their national regulations by March 2026. The GCD also introduces steep penalties for misleading claims, including fines and potential revenue confiscation.

US

The Federal Trade Commission is updating its Green Guides, offering clearer definitions for terms like 'sustainable' and 'organic'. Publicly traded companies must also align their environmental marketing claims with their environmental, social and governance disclosures in regulatory filings, to avoid shareholder or consumer lawsuits.

Asia

In jurisdictions such as Singapore, consumer protection laws penalize misleading claims under unfair practice provisions. While greenwashing-specific laws are not yet widespread, companies are expected to substantiate claims or face reputational and legal risks.

[▶ SEE NEXT PAGE](#)



7 actionable strategies for pet business leaders

Foster a sustainability-driven culture

Embed zero-waste goals into your core business strategy. Engage employees at every level with clear sustainability targets, reward innovation and prioritize transparency. Sustainability should be a shared value, not just a corporate initiative.

Stay ahead of regulatory change

Proactively track evolving sustainability regulations and engage with policymakers. By staying ahead of regulatory shifts, you'll not only ensure compliance but also position your company as a leader in the green transition.

Commit to radical transparency

Make traceability non-negotiable. Secure third-party certifications to back up your green claims and communicate your sustainability progress with honesty. Consumers, investors and stakeholders demand real proof, not just promises.

Break down silos and drive cross-functional collaboration

Zero-waste initiatives thrive when every department is aligned. Create cross-functional teams that bring

together expertise from operations, marketing, R&D and finance. These teams can uncover hidden opportunities for waste reduction and accelerate company-wide ownership of sustainability.

Champion circular innovation

Redesign products with circularity at the forefront. Go beyond traditional models, invest in research to develop alternative materials, explore refillable packaging solutions, and pilot product take-back programs. Today's design innovation shapes tomorrow's sustainability.

Adopt a life cycle perspective

Zero-waste success hinges on understanding every stage of a product's life cycle. Use life cycle assessments to identify waste hotspots and develop actionable end-of-life strategies. Metrics like product circularity and resource usage efficiency will keep you on track.

Strengthen governance for long-term impact

Embed sustainability at the top with executive accountability and regular audits. Ensure the board has the oversight needed to drive change and maintain momentum. Sustainability isn't a passing trend, it's a strategic imperative that requires constant attention and governance.

Building trust through compliance

Compliance plays a key role in shaping and driving effective zero-waste strategies, particularly as governments and regulatory bodies increase their focus on sustainability and environmental standards. The evolving regulatory landscape – from the European Green Deal to specific national laws – requires companies to not only meet environmental standards but also demonstrate a commitment to sustainability through robust, transparent and measurable actions.

By focusing on compliance, companies build trust while positioning themselves as sustainability leaders. This is how compliance contributes to zero-waste efforts:

Meeting legal obligations: Compliance with laws such as the EU's GCD and its Empowering Consumers for the Green Transition Directive ensures that companies make accurate environmental claims. These laws require businesses to substantiate their sustainability claims through verifiable data and independent third-party verification. This avoids misleading consumers and ensures that companies operate transparently.

Circular economy integration: Regulations often focus on packaging waste, forcing businesses to design products that minimize waste and to ensure that they are recyclable, reusable or compostable. Companies must adapt by embracing circular economy principles, which are increasingly integrated into regulations around product design, life cycle management and end-of-life processes.

Transparency and reporting: Compliance is more and more tied to transparency. Regulations such as the Corporate Sustainability Reporting Directive require companies to disclose their environmental impacts. Transparent sustainability reports, including waste reduction efforts, create trust with consumers, investors and regulators.

Proactive adaptation: As regulations evolve, businesses must adapt quickly to new standards. A proactive compliance strategy involves real-time tracking systems for waste management and regular internal audits to ensure operations align with requirements.

▶ SEE NEXT PAGE



Your NEW partner for premium wet petfood.



NEW THE FACTORY

21.000 sqm facility
Production capacity:
100-120 million units/year
Cans format: diameters 65, 73, 99
(from 70g up to 800g)
Low MOQ: 1.200kg



OUR SERVICE

Private Label and Co-Manufacturing
Marketing and Design
Internal Analysis Lab
Team of Vets and Nutritionists



PRODUCT INNOVATION

Available textures: mousse, pate', ragout, tartare, coarse pate', goulash, shredded fillets.
Plant based & Insect based.
Therapeutic Vet lines
Functional Food



QUALITY AND VARIETY

20+ types of meat/fish proteins
Fresh meat and Fish (when possible)
Exotic: special proteins
Huge choice of fruits, veggies, herbs

FACTORY VISITS ARE WELCOME



GOULASH



SMOOTH PATE



SHREDDED



COARSE PATE



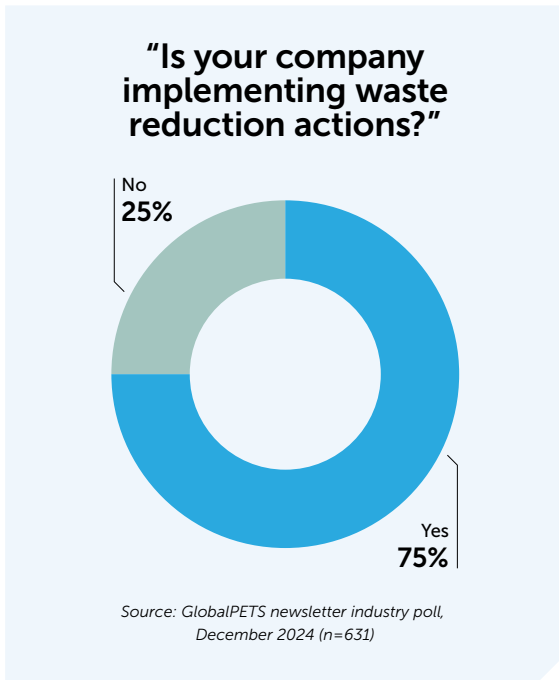
MONO PROTEIN

Contact and visit us:

- preferapetfood.com
- office@preferapetfood.com
- (+39) 351.72.60.569



Alba Iulia (RO)
Transilvania
Europe



Product innovation for zero waste

Innovation is central to achieving zero-waste goals, allowing businesses to design products and services that minimize waste from the very early stages of the development process. By innovating their product offerings and operational processes, companies can drive sustainability, maintain profitability and meet the rising consumer demand for environmentally responsible products.

Key directions for product innovation for zero-waste strategies include:

Design for durability and reuse: Businesses are increasingly designing products that are durable, reusable and recyclable. By considering the entire life cycle of a product – from raw material sourcing to disposal – they can minimize waste production from the early stages of the creative process, before the product enters manufacture.

Circular design principles: Emphasizing product longevity, companies are adopting circular economy principles, such as designing products for disassembly and ease of disposal. Integrating circular design frameworks, like circularity index and material

matrix, into the development process can incentivize innovation by providing actionable metrics to assess the recyclability and sustainability of the materials used.

Material selection: The focus on sustainable material choices is growing, as brands look to minimize their environmental impact. This includes adopting materials that contain post-consumer or post-industrial recycled content, bio-based materials and materials produced with renewable energy sources – therefore reducing dependence on virgin and fossil fuel-based materials.

Product-as-a-Service (PaaS) models: By shifting from ownership to access, these approaches help reduce waste and encourage more responsible consumption. In addition to minimizing environmental impact, PaaS models can create ongoing customer relationships, which enables companies to maintain product longevity and enhance overall product life cycle management.

Technological innovations: Adopting artificial intelligence (AI) can predict waste generation patterns, optimize inventory levels and streamline logistics to reduce overproduction and limit unnecessary packaging. AI-driven systems can also help companies forecast demand more accurately, reducing excess stock and ensuring more sustainable production practices.

However, the environmental burden of AI itself must be taken into account. The energy-intensive nature of training machine-learning models, as well as maintaining the AI infrastructure, can contribute to significant carbon emissions, particularly if this is powered by non-renewable energy sources.

Summing up

Zero-waste goals are no longer optional – they’re a critical component of doing business in a sustainability-conscious world. Green labeling, regulatory compliance and product innovation form the foundations of a successful zero-waste strategy.

Companies that prioritize this will navigate the complexities of regulations, while building trust with consumers and differentiating themselves in an increasingly competitive market. By embedding zero-waste principles into their operations, businesses can turn a regulatory challenge into a growth opportunity. ◆

Plasma: a functional protein reshaping pet nutrition

Discover why pet food manufacturers and formulators are tapping into plasma's bioactive properties to meet rising demands for better pet diets.



Plasma is a high-quality protein alternative with proven palatability that can outperform common ingredients, like egg powder, poultry byproduct meal and wheat gluten.

Research (Vasconcellos et al., 2023) shows it contains unique bioactive components – immunoglobulins, bioactive peptides and growth factors – that provide notable health benefits beyond standard nutrition, while enhancing food acceptance.

Key health benefits

- **Immune support:** Maintains the intestinal barrier and supports the immune function.
- **Prebiotic effect:** Encourages growth of beneficial bacteria such as *Lactobacillus*, supporting digestive health.
- **Cognitive support:** By promoting immune function, plasma may benefit neurological health.
- **High digestibility:** Improves nutrient absorption and reduces fecal volume.

Applications in pet food manufacturing

Beyond its health advantages, plasma offers considerable versatility in product formulation. From wet food and dry kibble to treats and supplements, its functional properties help manufacturers meet evolving consumer demands:

- **Nutritional value:** As an animal-based protein with essential amino acids, plasma complements other ingredients to support balanced nutrition across life stages.
- **Product quality:** Plasma's cohesive properties enable higher fresh-meat inclusion while maintaining water retention, emulsification and product quality, improving texture and durability.
- **Palatability:** Well-documented preference in dogs and cats makes plasma a key ingredient for improving food acceptance and intake.
- **Evidence-backed claims:** Research shows plasma's immune and digestive benefits, providing solid support for health claims on products tailored to life stages or health needs.

Moving toward sustainability

Plasma addresses sustainability by efficiently using animal ingredients that might otherwise be discarded.

Compared to proteins such as wheat gluten or egg powder, plasma's environmental footprint tends to be lower, supporting a more circular approach to pet food production.

Further integration into pet diets

As a global producer of functional plasma proteins, APC pursues new ways to incorporate plasma into pet diets by combining scientific insights, processing functionality and eco-conscious practices.

While still evolving, plasma stands out as a compelling ingredient that has the potential to reshape how the pet industry approaches both nutrition and sustainability. ♦

APC
APCpet.com

From waste to taste: using hydrolyzation to create a sustainable palatant

Convincing consumers to get on board may be the most challenging hurdle yet in the bid to use food waste hydrolysates as ingredients in pet food.



Emma Penrod
Contributor
PETS International

Waste created by food production is one of the most difficult waste streams to tackle as it cannot be easily converted to energy because it is too wet to burn. However, hydrolysis may offer a way of not only avoiding food waste, but utilizing it to add value to pet food.

Ways of working with waste

CSS Pet Nutrition CEO Dan Morash has a long history of working with the adaptive reuse of waste as an investor in waste-to-energy projects. He notes that a typical grocery store will throw out some 225 kg of viable food per day, including fruits and vegetables that are removed from the sales floor for cosmetic reasons.

“Burning, anaerobic digestion or composting of food wastes the nutritional value of food,” Morash says. “It’s much more productive to recover food no longer offered for sale or donation for beneficial use.” And that’s how an investment banker and energy expert came to found a pet food ingredient company.

Morash, alongside a growing number of experts around the globe, believes that hydrolysis could convert food waste and other agricultural byproducts into valuable ingredients for pet food. The hydrolysis process can improve protein digestibility, improve ingredient shelf life and even imbue otherwise mundane ingredients like vegetable trimmings or corn gluten with interesting bioactive properties.

But while the environmental benefits of more circular pet food could appeal to consumers in some markets, the concept of including waste in pet food could encounter resistance in countries such as the US, where consumers have moved toward human-quality foods for their pets.

“With the selection of cheaper enzymes, there is potential. It could be economically accessible...”

Depending on the process and feedstock used, protein hydrolysates can contain valuable antioxidants or even offer antimicrobial properties.

so I think the thing is to educate the consumers and the customers, and to make sure we meet the safety requirements,” says Yonghui Li, an Associate Professor of protein science at Kansas State University (KSU).

What is hydrolysis?

Speaking broadly, hydrolysis is the process of using enzymes or chemicals such as acids or alkalis to break larger molecules, like proteins, into smaller molecules.

According to Li, this is commonly done to improve protein digestibility and can work with various enzymes or starting feedstocks. There are several hydrolysates already on the market today, including wheat gluten hydrolysates and pea protein hydrolysates.

However, most of these existing hydrolysates rely on food-quality feedstocks like wheat or peas. For people who want to bring about a more circular economy – a concept in which all usable materials are ultimately recycled – the potential hydrolysis of food waste and agricultural byproducts holds special appeal.

The enzymatic hydrolysis process itself is environmentally friendly and it could add value to products that might be cheaper to throw away under normal circumstances, according to Li.

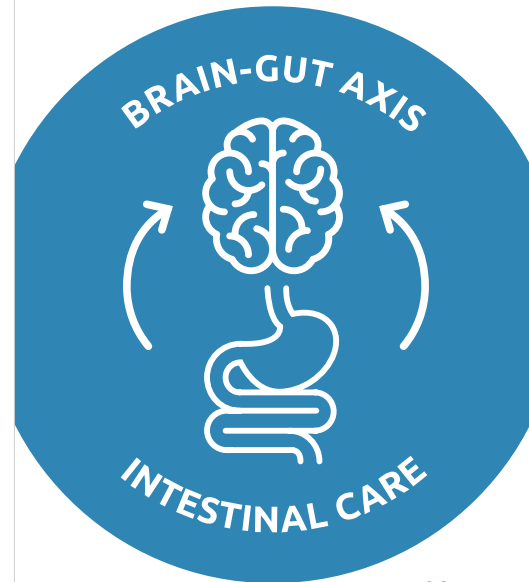
Hydrolysis can also unlock nutrients from waste streams like chicken feathers by breaking down indigestible molecules like keratin. “Chicken feather is an underutilized byproduct that can often cause environmental issues if mismanaged,” says Faslu Rahman, a researcher with the ICAR-Indian Veterinary Research Institute (IVRI). Rahman also notes that generating income from a recycled product can be a sustainable practice as it reduces waste.

Hydrolysates as palatants

CSS Pet Nutrition – founded in 2012 by Morash – collects grocery waste such as vegetables and then sorts, heats, grinds and processes it using a proprietary enzymatic digestion technology to produce hydrolysates at its 5,000-ton-per-year facility in Sacramento, California.

Initially CSS sold these hydrolysates as a liquid fertilizer and it still maintains this line of business. But along the way, it realized that the hydrolyzed fruits and vegetables could also serve as excellent palatants for pet food. The hydrolysis process cooks and concentrates the vegetables, “combining amino acids and simple sugars in the Maillard reaction”, explains Morash, “which is what happens when you sauté something in the pan and deglaze the pan to get the brown bits”.

[▶ SEE NEXT PAGE](#)



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

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





The CSS product has since outperformed market-leading pet food palatants in multiple feeding trials, and the fact that supermarkets pay CSS to take the waste means it can also beat existing palatants on cost. Furthermore, the company has conducted a life-cycle analysis that suggests that for every ton of food it recovers, it eliminates 1.7 tons of equivalent greenhouse gas emissions.

“The conventional palatant is hydrolyzed chicken livers, and when you look at the carbon footprint of feeding and growing chickens, versus us taking fruits and vegetables that would otherwise go into landfill, you are substituting something with a big carbon footprint for something that has a small carbon footprint,” says Morash.

Further benefits in pet food

Hydrolysis can come with a variety of other benefits. Depending on the exact process and feedstock used, protein hydrolysates can contain valuable antioxidants or even offer antimicrobial properties that can extend the shelf life of pet food. Some offer better technical functions, such as improved solubility or texture, while some offer a better nutritional profile, with more digestible proteins and bioavailable amino acids.

Most of the differences come from variations in potential feedstocks. In studies by Li’s research team, hydrolyzing corn gluten meal and distillers’ dried grains with solubles produced hydrolysates high in antioxidants with interesting emulsification properties.

A 2024 study led by Rahman at the IVRI demonstrated that hydrolyzing chicken feathers yielded a protein rich in histidine, arginine and lysine.

Potential drawbacks

While promising, hydrolysates are not without potential drawbacks. KSU’s Professor Li states that not every hydrolysate will perform well as a palatant – the process worsens the flavor of some feedstocks even as it improves the flavor of others.

Cost, Li notes, could also be an issue. “You could use some acid or alkali to break down the protein,” he says. “Acid or alkali would be cheaper, but the enzyme is more specific and we can better control the process.” Furthermore, in Rahman’s research, feeding large quantities of hydrolysates triggered diarrhea in pets, which could potentially limit inclusion rates.

But at least within the US, consumer acceptance could prove the biggest challenge. Rahman doesn’t think hydrolysates made from ingredients such as corn or chicken should pose an issue, but the inclusion of food waste could be where some consumers draw the line. Some advocacy groups have decried the use of waste products in pet food and complained that hydrolyzed food waste products lack transparency.

Consumer education – and quality control – will be key to accelerating the use of hydrolysates in pet food.

These concerns mean that consumer education – and quality control – will be key to accelerating the use of hydrolysates in pet food. “In other countries utilizing byproducts or waste can be more acceptable than in the US,” says Li. “We definitely need to make the consumer aware that this can be safe and even better quality, but at the same time we have to ensure the raw materials and the products are safe.” ♦

Galam

Supporting digestive health with prebiotics in pet food



As owners expect more from pet nutrition than ever before, we take a closer look at an efficient prebiotic solution for pet health.

Prebiotic fiber is known to support digestive health, boost immune function, minimize stool odor and promote overall vitality in pets. GOFOS™ is an effective prebiotic fiber delivering these health benefits in relatively low dosages: approximately 0.4% per ton for pet food formulations.

This natural, non-GMO prebiotic fiber is derived from beet sugar using a proprietary enzymatic process. It consists of around 95% short-chain fructo-oligosaccharides (sc-FOS).

The underlying science

GOFOS selectively nourishes beneficial gut bacteria, such as *Bifidobacteria* and *Lactobacilli*, which are essential to maintaining a balanced microbiome. In turn, a stable microbiome promotes efficient nutrient absorption, digestive health and a strong immune system.

Research shows that sc-FOS can help improve stool quality by reducing odor and enhancing consistency. Additionally, sc-FOS support the production of short-chain fatty acids (SCFAs) in the gut,

providing energy to colon cells and helping to reduce inflammation. Both of these functions are critical for overall gastrointestinal health.

In comparative studies, sc-FOS demonstrated stronger prebiotic effects than other ingredients like mannan oligosaccharides (MOS) and inulin. Moreover, combining sc-FOS with various prebiotics can offer a broader spectrum of benefits in certain formulations.

Key benefits in pet food

When used in pet food, GOFOS offers a number of benefits, including:

- **Enhanced digestive health:** stimulates the growth of beneficial gut bacteria for better digestion and nutrient uptake.
- **Immune support:** fosters a healthier gut, which plays a pivotal role in supporting immune function.
- **Naturality and sustainability:** derived from beet sugar, GOFOS meets the growing demand for ecofriendly pet food ingredients. It complies with the definition of 'naturality' by the US Association of American Feed Control

Officials (AAFCO) and aligns with the European pet industry body FEDIAF's Nutritional Guidelines for natural substances.

- **Palatability and solubility:** GOFOS has high solubility and remains stable under pasteurization and extrusion processes, making it suitable for both canned and dry pet foods.
- **Ease of use:** available in 3 forms – powder, powder with anticaking, and liquid – to cater to different manufacturing needs.

The creator behind GOFOS

GOFOS is produced by Galam, recognized as the world's largest manufacturer of fructo-oligosaccharides. Founded in 1940, Galam operates production sites in Europe and the Middle East, and also has a US distribution center. Renowned for supplying high-quality functional ingredients, the company maintains a commitment to research-driven innovation, sustainability and consistent product excellence. ♦

Galam Ltd.

galamgroup.com

Cracking the secret: eggshell membrane in pet food

Often considered waste, this byproduct can be naturally extracted and is highly functional. Using it in pet products could capitalize on nutritional trends.



Alexandra Wesker
Contributor
PETS International

Upcycling eggshell membrane – a byproduct of the egg industry – reveals a high-protein nutrient. The main nutritional support for pets relates to inflammation and therefore joint, skin and gut health. With consumers looking for convenience, this ingredient has the potential to tick multiple boxes.

Beneficial potential

Eggshell, with its various components, creates a complex material. The membrane is separated from the eggshell through a patented method and contains more than 400 proteins. As a result, its functionality is due to multiple pathways.

Eggshell membrane provides protein substrate, which can be converted to the building blocks for joints in the bodies of dogs and cats. It also contains compounds involved in the reduction of inflammation, the benefits of which can be seen in joint, skin and gut health.

Supporting joint health

Eggshell membrane contains multiple key proteins for joints including collagen types I, V, X, elastin and keratin. It also includes moderate levels of glucosaminoglycans (GAGs), chondroitin sulphate, hyaluronic acid and glucosamine – ingredients frequently seen in joint supplements for dogs and cats, as well those for humans.

Alongside the building blocks of protein, eggshell membrane also mitigates metabolic pathways with a detrimental effect on joints. This is because the natural composition of eggshell membrane exerts anti-inflammatory and anti-catabolic effects through the inhibition of nuclear factor kappa B (NF- κ B) binding activity. In addition, the eggshell membrane supplementation may increase SOD1 activity and thereby antioxidant properties.

Studies have shown that dogs whose diets were supplemented with eggshell membrane showed a decrease in inflammation markers, and those suffering from joint inflammation showed lower pain scores and an increase in both the range of joint movement and in overall movement scores. The effect on pain scores was visible within days from starting supplementation.

Boosting gut health

In the gut, inflammation can lead to issues in gut integrity and result in digestive upsets. Supplementation with eggshell membrane in some species has been shown to reduce inflammation-related bacteria in the gut and improve gut integrity. Supporting microbiota provides a platform for good overall health status, as microbiota play a major role in health and immunity.

Furthermore, the non-digestible fraction serves as a substrate to be fermented by gut microbes and increases microbiota diversity. It promotes the growth of bacteria associated with health and producing

short-chain fatty acids (SCFAs), which in turn provides an environment in the gut that accommodates a diverse microbiome and the development of healthy gut cells.

Applications in pet food

Eggshell membrane lends itself well for use in pet food. Its complex protein structure does not break easily and regular pet food production processes including extrusion and retort do not impact efficacy. Upcycling this byproduct from the human food industry creates high value by making joint, skin and digestion claims with one ingredient. This looks attractive for functional treats and snacks, in particular.

Care should be taken to check the purity of the eggshell membrane and whether the sourced material has been studied for its health benefits. Impurities including calcium carbonate from the eggshell reduce the purity of the ingredient and increase its calcium and ash content.

Medicinal claims (e.g. treating, curing or preventing a disease) may not be made for pet food items according to EU Regulation 767/2009. Claims regarding

antioxidant activity may reference scavenging of free radicals, however these statements may not reference counteracting harm done by those free radicals to cells, because that could be considered medicinal.

The wording 'anti-inflammatory' should not be used for the same reason. Eggshell membrane does not allow pet food to be claimed for a particular nutritional purpose (PARNUT) through EU Regulation 2020/3544.

Tapping into nutritional trends

Pet supplements including eggshell membrane focus on supporting normal function of the joints, skin and digestion, together with supporting joint development in large breed dogs.

The target audience includes customers looking for natural, ethical and convenient ingredients. Eggshell membrane naturally offers high nutritional values, and using a chemical-free extraction process supports a claim as a 'natural' ingredient in line with legislation. It is also a vegetarian, upcycled ingredient and so is suitable for both the conventional consumer and those looking for sustainable and human-grade ingredients. ♦

PET NUTRITION ENGINEERED TO MAXIMISE YOUR BRAND

SPECIALISTS IN
Bespoke premix
Independent technical support
NPD
Ingredients

Contact us to find out how we can
work with you to add value your brand

info@premiernutrition.co.uk
premiernutrition.co.uk

PREMIER
NUTRITION

MORE THAN JUST PREMIX



Texture matters

The role of coatings in extruded pet food

New technological advances, such as dual layering for coated kibble, show a sustained commitment to innovative pet nutrition.



Laura Ward
Pet Nutritionist

The coating of kibble is a key evolution in extruded food to increase palatability. It is also an important step in protecting the kibble core from oxidation, moisture and breakage while providing a means of adding functional ingredients such as probiotics to a pet food.

Factors affecting texture and coating

Coating layers provide scope for functional ingredient inclusion externally and creating various textures, as well as offering palatability options.

Several factors affect the coating and texture of extruded pet foods, and as a result the palatability. The quantity of fat that can be successfully applied as an external coating varies according to the method with which it is applied, the texture and porosity of the kibble, and the type of fat – to name just a few factors.

Vegetable and fish oils are predominantly polyunsaturated and therefore liquid at room temperature. Poultry fat tends to be liquid to semi-solid at room temperature, while pork grease or lard, ruminant tallows and coconut oil are solid at room temperature due to their higher degree of saturation.

The application of solid fats necessitates the warming of these oils prior to external application, as a liquid format is required. The appearance and textures created by each of these coating options also differs.

It is also important to consider the quantity of liquid applied to kibble externally. Less than 2% fat or liquid palatant coating can mean that kibble appears anemic or that the coating is uneven. If the coating is too great, the kibble can have a greasy texture with the possibility of fat transferring to the packaging or even pooling in the bag, especially in warmer conditions.

Methods of application

Within the area of extruded products, the wide diversity in foods requires different approaches for coating. Methods such as batch coating and continuous drum coating are now considered more traditional methods. Newer approaches suit different products, depending on the density, porosity and quantity of external coating and the intended consumer.

Continuous paddle coating and vacuum coating provide more specialized solutions, uniformity of coating or precision. Atmospheric coating methods usually involve a tumble drum spray or falling curtain system, which can work as a continuous process. Where a liquid palatant or digest is used, this may also be applied with the fat coating.

Less than 2% fat or liquid palatant coating can mean that kibble appears anemic or that the coating is uneven.

Vacuum batch coating is a solution to draw more externally applied fat into a kibble, allowing more fat to be applied externally than with atmospheric coating. This is especially beneficial when there is a larger quantity of fat to be applied externally, or for denser, less porous kibble where fat or liquid coatings aren't easily absorbed.

Vacuum systems can work at high, medium or low settings, with larger quantities of external fat and denser kibble requiring higher vacuum settings to achieve the desired results. A recent study by Symrise Pet Food (SPF) found that vacuum coating of kibble improved palatability in cats.

Differential cooling leaves time between fat coating and the following dry ingredient coating. Often, powder ingredient coating occurs directly after liquid coating, to better allow the powder to adhere to the kibble.

A pause, however, of for example 24 hours, allows the fat coating to reach solid state, prior to the powder coating stage. The reason for this is to retain dry palatants at the kibble surface rather than becoming embedded in the fat coating. The SPF palatability study also found that this technique significantly improved palatability for cats when compared with atmospheric coating.

Nutritional possibilities

As innovations and trends within the pet food industry evolve, there are both opportunities and challenges for coating and texture. Coating technology is advancing, and the process of liquid, followed by powder coating gives opportunity for novel ingredients to be incorporated into the coating layer of kibble, rather than being limited to the core.

As the functional nutrition trend continues, the scope for ingredients to be included post-extrusion is exciting. Future advances in kibble technologies may further differentiate between the core and coating layers, to optimize the nutrition and characteristics of each when developing and finessing pet foods. ♦

TRUSTED BY THE BEST

POWTECH@DINNISSEN.COM WWW.DINNISSEN.COM



Start optimizing your recipes with
PEGASUS® Vacuum Coating

- ✓ Stronger, more nutritious kibbles
- ✓ Perfect quality in every particle
- ✓ For healthier and happier pets



DINNISSEN
PROCESS TECHNOLOGY

Do the right thing: how is CSR evolving across the global pet industry?



Ethics and sustainability are front of mind worldwide, and manufacturers are responding with initiatives designed to give back to the planet, to people – and to their pets.



Megan Tatum
Contributor
PETS International

Cutting your carbon footprint, responsible sourcing, raising millions for charitable causes – the pet industry is investing more than ever in corporate social responsibility (CSR) programs. This reflects a growing legal obligation to divulge how a business addresses social and environmental impact within its value chain.

Be ethical... or lose customers

The EU's Corporate Sustainability Reporting Directive entered into force in 2023, requiring large companies to publish their progress on environmental, social and governance matters via annual reports. But greater efforts toward CSR schemes also reflect the changing values of their global consumer base.

Nearly two thirds (63%) of consumers feel that ethical issues are becoming more important, according to Mintel research, and 34% of Gen Z are willing to boycott companies they feel aren't doing their best to give back. So, what types of CSR programs are

pet manufacturers focusing on? And what impact are they having – both on the planet and on the business itself?

CSR as company purpose

At Italian pet food manufacturer Almo Nature, CSR isn't an add-on, it is integral to how the business operates, explains Marketing Manager Costanza Levera.

In 2018, 8 years after the brand launched, founder Pier Giovanni Capellino announced all future revenues (after costs and taxes) would be used to fund the work of a newly created non-profit philanthropic foundation, Fondazione Capellino.

The company's commercial model – which Capellino has dubbed the 'reintegration economy' – also flips traditional CSR on its head, as the charitable foundation owns Almo Nature, rather than the other way around, meaning donations can't be withdrawn. "We are not just a purpose-driven company, we are the purpose," says Levera.

"The mission of Almo Nature is the same mission as the Fondazione Capellino, because we're the same

entity. There is no conflict of interest, because all that we gain goes toward this shared purpose, which is the protection of biodiversity.”

There are 5 core pillars that shape this work: habitat and biodiversity corridors; climate change; biodiverse agriculture; impact of human activities on biodiversity; and the restoration of historic buildings at Villa Fortuna. This year, for example, saw the start of farmhouse renovations at the site that will become the HQ of a new biodiversity school.

Building a brand ethos

At other pet product manufacturers and brands, although CSR priorities might not be quite so inextricably linked to business operations, they're still fundamental to brand ethos. That is certainly the case at Scottish pet food firm Rùn Dog Food.

“Rùn is a Scottish Gaelic word, meaning ‘to have purpose’, and we hold that very strongly here,” says

founder Lucy Millar. “While our main purpose is providing excellent nutrition with honesty and integrity, we also take great pride in being as sustainable as we can.”

For a small brand, there are limits to the changes it can make to how it sources sustainable ingredients, but it has focused heavily on creating eco-packaging.

“If I spend all this time and energy creating food that is simply good for dogs, then I want the packaging to reflect the contents and also to be better for the environment than the current options we see on supermarket shelves,” says Millar.

All Rùn's products were packed in brown kraft paper or compostable cellulose. Thinking there might be a way to do even better, packaging was scrapped completely and retailers given the option to bulk buy in 25 kg sacks. Customers can bring reusable containers and purchase exactly as much as their dog needs. [▶ SEE NEXT PAGE](#)

cebican

cosmo

The new universe of flavours

Discover our catalogue for petfood professionals



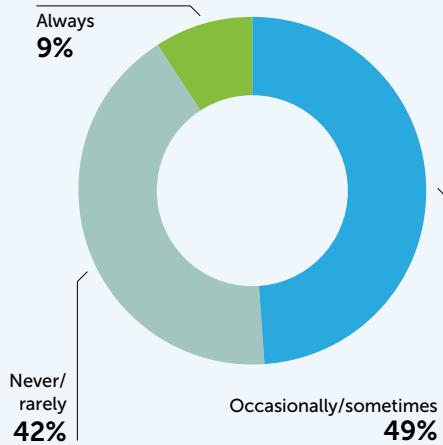
cebicancosmo.com



info@cebicancosmo.com | +34 986 55 46 76

Visit us at **IBERZOO PROPET** IFEMA, Madrid
26 - 28 February
Stand 10H06

Consumers' propensity to switch pet food due to sustainability



Source: L.E.K. Global Consumer Sustainability Survey 2024 (n=2,132)

The brand avoids single-use and waste elsewhere in its business, too. For example, on learning that the printed backdrops used at trade shows are routinely used once and binned, it began using large rolls of hessian and some string to set up its stand instead. "The natural aesthetic fitted our brand perfectly and customers absolutely loved it."

Planet-friendly pet food

UK-based Omni has a similar strategy. "Our ethical brand positioning is still very much at the core of who we are," says co-founder and vet, Dr. Guy Sandelowsky. The brand says its use of novel proteins to create the brand's vegan pet food range makes its products more sustainable and ethical than other options, but it also invests in additional CSR initiatives.

These include an ongoing application to become a B Corp – considered the gold standard for ethical brands – and a partnership with business sustainability platform Greenspark to plant trees. "We aim to introduce products that are packed in recyclable or biodegradable packaging," says Sandelowsky. "We also support charities and charitable pet events with free products."

Reducing the carbon pawprint

Though creating a more ethical enterprise is one motivation for business owners taking the time to invest in CSR, there are also clear commercial upsides. L.E.K. Consulting conducted a Global Consumer Sustainability Survey in 2024 among 5,000 consumers in Australia, Brazil, China, France, Germany, India, Japan, Spain, the UK and the US.

The research findings show that 54% of pet food buyers are willing to pay a premium for more sustainable products, versus just a quarter 3 years ago. Only a small percentage (7%) said it would make no difference to their purchase decision.

"I think that these values get more important year on year," says Millar from Rùn. "We, as pet owners, like to know that our pets are well taken care of first and foremost, but knowing that we are also helping to reduce their carbon pawprint, and that the brands we order from are doing their best, is of huge importance."

Taking center stage

There can be challenges in meeting this consumer demand – particularly for a business like Almo Nature, where CSR and commercial operations are so intertwined.

"We struggle daily with distribution, because distributors only want more discounts and better contracts," says Levera. "They don't care about what a company or brand brings to the community. They don't understand that which product they offer to their consumer makes a difference, today and for the future."

She adds: "Our products are just an instrument to achieve our real final aim." And although Almo Nature might be the only brand that can make that claim, it's clear that CSR is taking center stage on corporate agendas across the whole global pet industry, as pressure grows on all brands and retailers to do the right thing. ♦

Though creating a more ethical enterprise is one motivation for business owners taking the time to invest in CSR, there are also clear commercial upsides.

Building on strong foundations

Pet business continues to bring in investors



Despite some challenges, investor interest in pet businesses remained robust across Europe over the past 12 months. What were the key drivers, and what are the predictions for M&A activity this year?



Alex Masters

*Co-head of Consumer, Europe
Lincoln International*



Matthew Lee

*Co-head of Healthcare, Europe
Lincoln International*

The pet consumables and pet services sectors have continued to be attractive markets, persisting as one of the most investable segments within the consumer sector as a whole. As evidence of this, the industry carried on seeing strong mergers and acquisitions (M&A) activity across Europe in 2024.

Strength of M&A activity

Over the past 3 years, the European pet consumables industry has consistently recorded high M&A activity with an annual deal volume of 70-80 transactions, according to Pitchbook. With approximately 70 deals in 2024, there was a 10% decline in activity compared to 2022. Nevertheless, this decrease is modest relative to the broader consumer sector, where deal volumes dropped by 15% over the same period.

The industry has faced some challenges, including failed transactions and some prolonged auction processes, often resulting in sellers reinvesting alongside new investors. However, investor interest in the sector remained robust last year, and was comparable to pre-COVID and pre-Ukraine war levels.

Veterinary space

After a modest volume of deals in 2023, activity in the veterinary clinic space continued to recover in 2024. Successful deals for Italy's Gruppo Animalia, Village Vets Ireland, Tierarzt Plus Partner in Germany, and LuxVet – a partnership-based, flexible business model for Poland's veterinary industry – demonstrated a clear recovery of poise and appetite.

Unavets, a chain of over 151 vet practices in Spain and Portugal, only narrowly missed out on a deal. Meanwhile, veterinary services group VetPartners UK remains up for sale by private equity firm BC Partners for a purported £3 billion (€3.6B/\$3.76B).

Animal health products and services

More broadly, global investment bank Lincoln International saw a diversification of interest across the animal health products and services sector as investors looked to capitalize on the humanization and pet ownership trends.

For example, Levine Leichtman invested in Improve International, a veterinary education and training business headquartered in the UK with offices in several European countries, as well as the US. Private equity firm Bridgepoint invested in Identichip, the UK's national microchipped pet database, while Exponent supported the future growth of Chanelle Pharma, Ireland's largest manufacturer of veterinary and medical generic pharmaceuticals.

[▶ SEE NEXT PAGE](#)

On the strategic side, Luxembourg-based JAB Holding Company has been sweeping up the global market for pet insurance assets. Clearly, it is seeking to take advantage of the growing demand for pet insurance against the backdrop of escalating costs for veterinary care.

Pet food and hard goods

When it comes to the split between pet food and hard goods such as beds, toys and accessories, pet food dominated deal volumes from 2022 to 2024, representing approximately 70% of transactions. This reflects pet food's status as a necessary daily consumable, underpinned by consumer loyalty to premium and specialized nutrition brands.

However, diversification into hard goods is gaining traction in the European pet consumables M&A landscape. Companies are increasingly pursuing combined offerings to capitalize on evolving consumer preferences and trends such as sustainability and product innovation.

Analysis of buyers and investors

Buyers and investors in the European pet consumables market are adapting their strategies to align with the evolving economic climate and sector dynamics. Venture capital (VC) activity accounted for approximately 25% of deals in 2024, down from 45%

Potential investors will be keeping a close eye on industry dynamics such as the reduced volume of visits being experienced by vet clinics.

in 2022. This significant decline reflects a reduced appetite for early-stage investments amid tightening economic conditions and a cautious funding environment.

Consolidation is being driven by larger, established strategic players. In 2024, strategic buyers represented 45% of deal volumes, up from 25% in 2023. This sharp increase highlights the priority buyers are placing on market share growth and synergies.

After a dip, private equity (PE) interest has rebounded. It accounted for 30% of deals in 2024, up from 20% in 2023. This resurgence indicates renewed confidence in the sector's resilience and profitability, with many PE firms targeting scalable and innovative assets.

Fertile ground for investment in 2025

Lincoln International is aware of 2 €1 billion (\$1.04B) enterprise-value veterinary clinic deals slated for the second half of this year, but expects to see increased M&A volume before then.

The European pet consumables industry continues to offer fertile ground for M&A activity, driven by consumer trends, market fragmentation, and a focus on innovation and sustainability. Despite reduced VC activity, the return of private equity, combined with increased strategic acquisitions, signals a sector poised for continued growth and transformation.

Opportunities abound for investors to capitalize on this dynamic landscape, but competition for high-quality targets remains intense. As consolidation reshapes the industry, the emphasis on quality, sustainability and digital transformation is likely to define the next wave of transactions.

Recovering volume in vet care

However, potential investors will be keeping a close eye on industry dynamics such as the reduced volume of visits being experienced by vet clinics. This is largely



driven by the cost-of-living and inflationary pressures impacting wallets, as well as the demographics of the 'pandemic puppies and kittens'. These have now moved into young adulthood and therefore currently require fewer vet visits and less medical care.

As a European market proxy, US data from the American Veterinary Medical Association (AVMA) and Vetsource highlights a 2.4% like-for-like (LFL) decline in practice visits in the past 12 months.

Encouragingly, in their recent results, CVS Group and IDEXX point to lower visit volumes as a short-term negative. Lincoln International agrees with this conclusion. After all, as this COVID cohort enters a more mature stage of life, these pets will require more care once again, leading to a V-shaped recovery in the veterinary sector.

The question is, how will investors factor the recovering volume dynamic into their deals in 2025? Based on 2024 deal activity, investors are likely to take a longer-term positive view for the best-in-class assets. ◆

Key trends that have bolstered the pet consumables segment's resilience

- **Increased pet ownership:** A 10% rise in pet ownership during the COVID-19 pandemic, particularly among younger generations, has sustained demand.
- **Changing consumer behavior:** Younger pet owners, often identifying as 'pet parents', favor premium and natural brands over mass-market options.
- **Inflationary pressures and pricing power:** Consumers have largely absorbed higher prices for pet food caused by significant inflation in raw materials, energy and wages. However, trading down and longer replacement cycles have been evident in the hard goods segment.
- **Reversing input price trends:** Declining inflationary pressures in 2023 and 2024 have created opportunities for brands to pass on some of the cost benefits to consumers through increased promotional activity.
- **Demonstrating adaptability:** Despite economic pressures from the Ukraine conflict and rising living costs, the pet consumables market has demonstrated adaptability, underscoring its attractiveness to investors.

GOLDEN *Nature*

PURE NATURAL FIBRES



Biodegradable Compostable

Super-fast
clump formation



pet-earth

pet-earth GmbH

+49 (0) 5731 868310-0 info@pet-earth.de

www.pet-earth.de/en



Unlock effective joint health support for companion animals

Why collagen might be the key nutrient that will enable brands to stand out in a growing joint health supplements market.



Juliana Erickson
Global Product Innovation Manager
Lonza Capsules & Health Ingredients
lonza.com

Joint discomfort is a growing concern for pet parents. With companion animals living longer and obesity becoming a more common concern, the prevalence of joint pain and chronic conditions such as osteoarthritis (OA) is rising. Research shows that 52% of dog owners observe some form of joint pain in their companion animals, highlighting the importance of proactive joint health support to keep a dog active and comfortable as they age.

Importance of undenatured type II collagen

For brands looking to stand out in this growing sector of the pet market, ingredient choice is key. Collagen – particularly undenatured type II collagen – is emerging as a vital nutrient to support joint health and help brands elevate their pet joint health supplements.

Collagen is a vital protein found in both humans and animals, existing in several types. Type II collagen, in particular, plays a crucial role in joint health. As the

primary supporting collagen in articular cartilage, it makes up 90-95% of the collagen in the joint. So it's an essential nutrient for promoting mobility and overall joint health.

Within the nutraceutical space, type II collagen is typically available in two forms: hydrolyzed collagen peptides or undenatured type II collagen.

To make hydrolyzed collagen, the protein is broken down into smaller fragments through a hydrolysis process. Undenatured type II collagen preserves the complete, native structure, enabling it to deliver effective joint health benefits at a significantly lower dose.

Science-backed ingredients provide manufacturers with the opportunity to create highly effective pet products. For instance, Lonza's UC-II® undenatured type II collagen offers proven benefits for joint flexibility and mobility, supported by over two decades of brand-specific research and multiple studies in both humans and companion animals. It has also been proven to provide joint and mobility benefits at a very low daily dose, without compromising on efficacy.

PORTA

— CAT CARE —



Science-backed joint support

Research shows that a daily dose of just 40 mg of UC-II undenatured type II collagen helps to support joint health and mobility in both healthy companion animals and those with OA. Scientific studies have reported that this low dose can reduce – after 150 days – overall pain in OA dogs by up to 81%, and exercise-induced pain by up to 90%.

In healthy and active animals, this daily dose has been proven to support mobility. After 13 weeks of supplementation, dogs receiving the ingredient show reduced inflammatory markers, and less cartilage degeneration after long runs, compared to those receiving a placebo.

With such a low dose, manufacturers can create effective and convenient products that encourage compliance. UC-II undenatured type II collagen is formulation-friendly, allowing it to be easily incorporated into a variety of products, including treats and chews.

In an exploratory study of dogs with degenerative joint disease, owners reported improvements in joint comfort and mobility after administering chews containing 40 mg of UC-II undenatured type II collagen. This efficacy at such low doses is enabled by UC-II® undenatured type II collagen's structure and unique mechanism of action.

Preserved structure for better impact

Unlike other forms of collagen on the market, Lonza's UC-II undenatured type II collagen retains its 3-dimensional shape, which is key to collagen's function for joint health. It is developed using a proprietary, gentle manufacturing process that makes it resistant to breakdown from gastric acid and digestive enzymes, and therefore preserves its structure.

It is this structure that enables the unique action mechanism of the UC-II collagen, triggering the pet's immune system to restore and build joint cartilage. That process helps to promote optimal joint function, support a healthy inflammatory response, and preserve cartilage – ultimately translating to improved joint health and mobility for companion animals.

Helps companion animals keep up

With its proven joint health benefits and formulation flexibility, UC-II undenatured type II collagen offers exciting innovation opportunities for manufacturers. From walking in the park and running round the garden, to jumping and playing fetch with their favorite toy – help companion animals keep up with their owners, with UC-II® undenatured type II collagen. ♦

SoftCat®

WITH YUCCA



LONG LASTING



**SUPER
ODOUR CONTROL**



COMPOSTABLE

NEW




Schulze Heimtierbedarf GmbH

Osterkamp 11 | 32457 Porta Westfalica, Germany

info@portapet.de

+49 5731 98200-0



Using research to identify pet supplement sales opportunities

Purchase behavior insights can highlight shared consumer interests and preferences that provide useful information for marketers.



Nicole Hill
Executive Director of Strategy
MarketPlace & Nextin Research

As product and ingredient brands look to the future, consumer insights can aid those anticipating where pet supplements – and their shoppers – are headed. Beyond what pet parents have purchased in the past, future-facing research explores why and how they make their pet vitamin and supplement purchases.

The supplement purchaser

Pet supplement purchasers make up nearly a third (32%) of pet parents in the US, according to the last annual survey from Nextin Research by MarketPlace. This subgroup of pet parents is distinguished by several shared motivations and behaviors. While there are attributes shared among those who purchase pet supplements, further segmentation by pet species and human behaviors can illuminate the nuances within this audience.

Pet supplement purchasers are more likely than average to buy a variety of pet products, with higher

reported purchases of pet treats, grooming products and dental care products. For brands and retailers, this may indicate an opportunity to bundle or merchandise complementary products: an allergy support supplement alongside anti-itch pet shampoo, for example.

Nearly a third of the purchasers report looking for a specific ingredient when buying pet nutrition products. Among pet supplement purchasers, 42% associate probiotics with positive health benefits for pets. Search engine marketing and packaging design both play a role in helping pet supplement shoppers find the brands and products that contain the ingredients they seek.

What's the benefit?

Among the pet supplement purchasers, 88% have dogs and 52% have cats, with the overlapping 40% indicating households with both cats and dogs. The decisions they make for each type of pet are markedly different, even among pet parents with both. "A specific benefit" is the first and most common consideration on a pet owner's path to purchase.

While skin and coat benefits are commonly sought by both cat and dog supplement buyers, cat parents are twice as likely as dog parents to have purchased a product for urinary and kidney support in the past 12 months. In contrast, 40% of dog supplement purchasers made joint health product purchases, a 13 percentage point increase compared to joint support purchases for cats.

Information and influence

Pet supplement purchasers spend time researching pet health and nutrition topics. In addition to consulting veterinarians, friends and family members, they seek pet health inspiration and information from online searches (55%) and online reviews (42%). They are also more likely than average to seek information about ingredients. More than half (54%) reported researching vitamins and/or minerals in the previous 12 months, a 16 percentage point increase compared to the overall US pet audience.

While conventional search engines like Google are used by a majority of pet supplement purchasers, there are a number of other online touchpoints through which brands can connect with consumers. A notable subgroup (39%) of pet supplement purchasers seek pet-related inspiration and information from YouTube.

YouTube and video content

The YouTube subsegment is more likely to also get inspiration and information from Instagram (47%), TV

More than half of pet supplement purchasers reported researching vitamins and/or minerals in the previous 12 months.

(45%) and TikTok (39%), indicating a greater inclination toward video content formats. For brands who use video assets in their marketing, leveraging these across multiple platforms may aid in recall and reach.

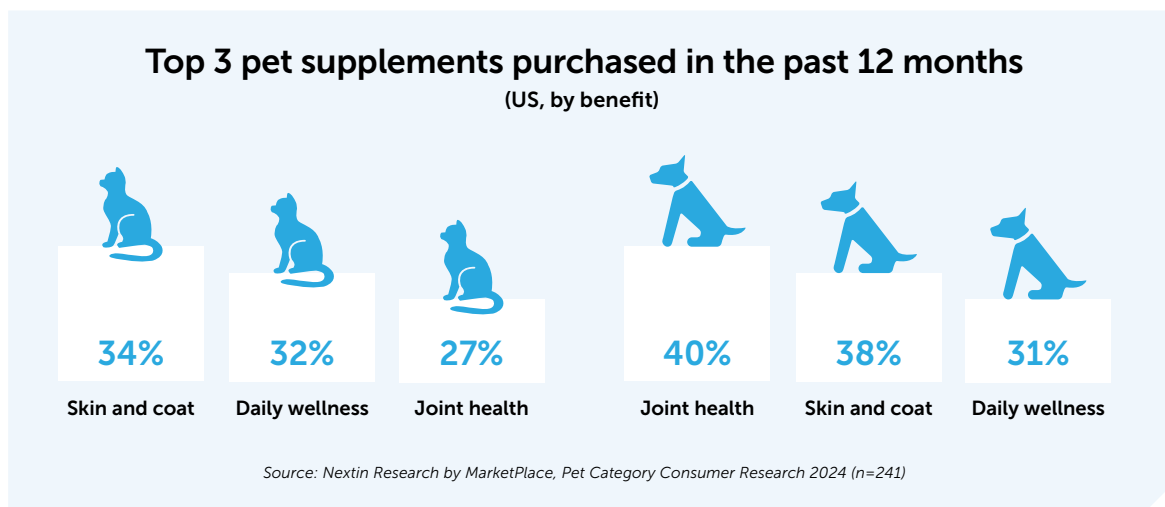
Topics of interest to pet supplement purchasers include cannabidiol/CBD (40%) and vitamins and/or minerals (64%), both of which the YouTube audience was more likely than average to have spent at least an hour researching in the past year.

Although identified by their use of the online video-sharing platform, more than half (56%) of the YouTube audience reported making a purchase at a pet specialty store in the past year (56%), 11 percentage points higher than the average pet supplement purchaser.

Learning about shopping habits

Pet parents who purchase supplements are most likely to shop at Amazon, online pet retailer Chewy, mass retail stores and pet specialty stores. They're notably more likely (+15 percentage points) to purchase pet products from Chewy than the average US pet parent. And these pet consumers are also more likely to shop at multiple retail channels for pet-related purchases.

[▶ SEE NEXT PAGE](#)



NUTRIPE®

INSPIRED BY NATURE, FORTIFIED BY SCIENCE



KRUNCH

OVEN-BAKED FOOD

Cold-pressed rustic bites, Oven-Baked to perfection
with New Zealand's FINEST ingredients

Slow **oven-baked**
to retain **natural flavour**
and nutrients

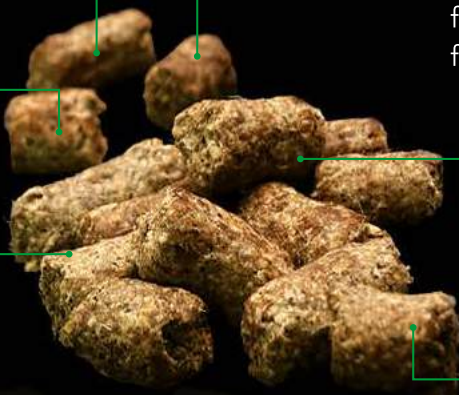
Supports **overall health**
and **well-being** with
nutrient-rich ingredients

Crafted to offer a
delightful and **gratifying**
dining experience

Includes **superfoods** like
fish oil, fava beans, and
flaxseed for **optimal health**

Every bite features distinct,
rustic shapes, perfect for
natural feeding

Enriched with **green tripe**
for **gut health** and
nutrient absorption



We welcome inquiries from international distribution
and retail partners. Get in touch at enquiry@nutripe.com.

  [nutripe.official](https://www.nutripe.com)



SCIENTIST FORMULATED

In addition to what pet supplement purchasers buy and where they consume content, how they shop can inform a deeper understanding of this audience. These behaviors could indicate a motivation and willingness to seek out and stick with pet products they value, even if it means visiting multiple stores and websites to do so.

The bricks-and-mortar shopper

According to Nextin's 2024 consumer data, 83% of pet supplement purchasers have bought pet products in bricks-and-mortar stores in the previous 12 months, whether mass retail, pet specialty, club or grocery. But these consumers don't only shop at physical stores: more than half of the bricks-and-mortar shoppers also reported purchasing pet products from e-commerce sites Chewy (58%) and Amazon (53%).

This bricks-and-mortar subsegment is distinguished by more than where they shop. For retail buyers seeking opportunities to expand, consider that 53% of these shoppers have also purchased pet dental products in the past 12 months. So placing pet dental within the eye line of pet supplement shoppers could be a path to optimizing your shelf space.

The online shopper

Of those who purchase pet supplements, 55% reported making an online pet product purchase in the previous

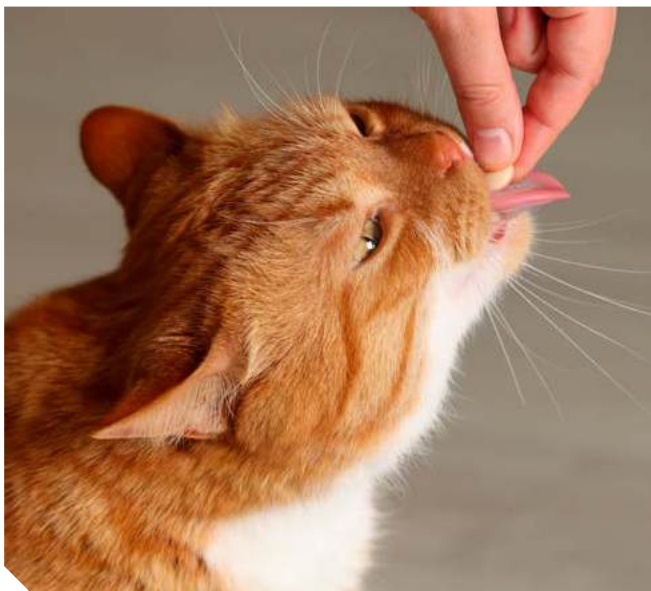
A notable subgroup of pet supplement purchasers seek pet-related inspiration and information from YouTube.

12 months. In addition to supplements, this audience was more likely than average to have purchased products for pet grooming, dental care and waste management, such as litter box supplies or dog waste bags.

Every respondent within this online shopper subsegment reported seeking pet health inspiration and information from online searches in the past 12 months, underscoring the importance of search engine optimization and marketing efforts for brands seeking to grow online sales.

Anticipating the category's future

While purchase data is valuable when assessing current market size and the attributes of past product purchases, its retrospective focus on products that are already on the market can lack innovation-driving insights. For those seeking to meet an unmet need or otherwise disrupt a category through innovation, consumer research can help bridge past behaviors, current values and motivations, and future aspirations, to provide valuable insight. ♦



Retail channels used by pet supplement purchasers in the past 12 months (US)



Source: Nextin Research by MarketPlace, Pet Category Consumer Research 2024 (n=241)



Farm Company ITALY
Deluxe functionality for dogs

Farm Company launches its 2.0 version of Nylon Deluxe range of functional collars, harnesses and leashes.

The revisited version includes an extra padded handle on the Secur-Fit harness to allow pet parents to have an increased control of their dogs, reflective inserts on nylon tape, and a multifunctional leash that can be used either as a training leash or as a running leash.



Farm Company Srl
 info@farmcompany.it
 farmcompany.it



Himadriyati Food Products INDIA
Handmade Himalayan cheese chews

Artisanal churpi cheese chews made from the milk of free-range cattle in the Himalayas and based on a traditional recipe. Available in different sizes and natural flavors, including strawberry, mint, turmeric (curcuma) and peanut butter, as well as in puffed versions. Customized flavors available on request. Please reach out for more information.



Shipping worldwide.

Himadriyati Food Products Private Limited
 purbali@himadriyati.com
 himadriyati.com



VAFO CZECH REPUBLIC
Brit Care cat soups

A complete meal or a tasty topper to enhance your cat's favorite kibble, these soups are the ultimate combination of irresistible flavor and hydration.

Packed with essential nutrients and vitamins, they're perfect for even the pickiest eaters.

Enriched with taurine, they support sharp vision and a healthy heart, while their high moisture content promotes urinary tract health.

Whether served as a standalone meal or a tasty topper, these soups boost digestive wellbeing with added probiotics.

Suitable for cats of all ages, they're a wholesome way to show your pet some love.

Treat your furry companion to the goodness they deserve – healthy, happy and purring!

VAFO Group a.s.
 info@vafo.cz
 vafo.com

Tapping into the appeal of meal enhancers



As US owners increasingly add extras to their pets' meals in an effort to persuade them to eat, the growing importance of this food category is becoming apparent.



Andrea Deitert
Global Insights Lead
NielsenIQ

Meal enhancers have become a key segment in the pet food industry, showcasing consistent growth over the past 5 years. Despite relatively low market share, their value lies in the ability to improve pet food palatability, catering to the preferences of even the pickiest of pets.

Consistent growth in a niche market

In the US, pet meal enhancers accounted for 7.9% of the value share in cat food and 4.5% in dog food in 2024. This marked an increase of 1.7 and 1.3 percentage points respectively since 2020.

While the category's value growth remains robust – boasting double-digit compound annual growth rates (CAGR) of 17.7% for cats and 20.7% for dogs – volume growth has lagged behind, with an increase of 11.9% for cats and 10.5% for dogs. This disparity reflects continually rising prices, driven by inflation and the economic impacts of COVID.

Interestingly, the appeal of meal enhancers lies not just in their nutritional benefits but also in their textures and flavors. Products like broths, stews and assorted flavor packs are particularly effective in enticing pets to eat their meals. These offerings cater to the diverse preferences of both cats and dogs, helping owners ensure their pets enjoy a satisfying dining experience.

[▶ SEE NEXT PAGE](#)

MORE THAN PALATANTS. SOLUTIONS.



AFB is more than just palatants. We provide custom solutions to improve pet food palatability, meet attribute requirements, achieve performance targets, and deliver technical objectives.



**CLEAN
LABEL**



**SUSTAINABLE
INGREDIENTS**



**FUNCTIONAL
INGREDIENTS**



**SPECIALIZED
DIETS**



**WE MAKE PET FOOD
TASTE GREAT.™**

Our experts will collaborate with you to find the best solutions for your brand. **We are your global partner!**

Argentina | Australia | Brazil | China | Mexico | Netherlands | United States | Thailand | afbinternational.com



© 2025 AFB International

Cat owners lead the way

Cats dominate the meal enhancer market in the US, with 16.4% of cat owners purchasing these products compared to just 6% of dog owners. This equates to a quarter of all cat wet food buyers incorporating meal enhancers into their purchases, versus only a tenth of dog wet food buyers.

However, it's worth noting that both segments experienced a slight decline in pet owner reach – numbers of buyers – compared to the previous year.

Cat owners also purchase meal enhancers more frequently – around 7 times a year, double the rate of dog owners – and spend significantly more annually.

On average, they spend \$70 (€68) a year on meal enhancers, compared to the \$43 (€41) spent by dog owners. However, because cat owners buy these products more often, their per trip expenditure is approximately 20% lower than that of dog owners.

E-commerce vs traditional retail

Purchase patterns reveal interesting insights into retail preferences. Online plays a significant role in this category, particularly for cats, with 46% of meal enhancer purchases occurring online.

This compares to less than 4 out of 10 (37%) purchases of meal enhancers for dogs. Both segments have experienced steady growth in online sales over the past 3 years, driven by convenience and the increasing variety of options available on digital platforms.

Despite the rise of e-commerce, traditional retail channels remain important. For dogs, nearly half of all meal enhancer sales come from pet specialty stores. In contrast, grocery stores hold a stronger position in the cat segment, accounting for about a quarter of total sales. This dual-channel purchasing highlights the need for brands to maintain a strong presence both online and in physical stores to maximize reach.

On average, cat owners spend \$70 (€68) a year on meal enhancers, compared to the \$43 (€41) spent by dog owners.



The rise of broth

Broth has emerged as one of the main subcategories within the meal enhancer segment. For cats, broth accounts for 40% of the total meal enhancer market – a share that has remained stable over the past 5 years. For dogs, broth represents 20% of the market and has experienced substantial growth, with a 3 percentage point increase in the last year alone.

Broths are particularly popular due to their versatility and premium appeal. Assorted flavor packs for cats, which often feature a mix of seafood and poultry flavors, dominate the broth segment, followed by chicken and tuna combinations. Interestingly, toppers – which are a smaller part of the cat meal enhancer category – have demonstrated the fastest growth, with a 5-year CAGR of 19.9%.

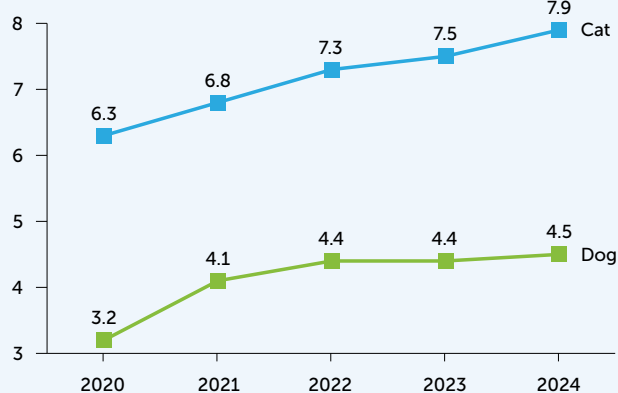
For dogs, the growth of broth has been even more impressive. With a 5-year CAGR of +7.7%, broth significantly outpaces overall growth of the wet food category (+11.2%).

Volume growth tells a similar story, with broth increasing by 44.4% compared to the declining volume growth of wet food (-2.1%). These figures underscore broth's potential as a driver of innovation and growth within the meal enhancer market. [▶ SEE NEXT PAGE](#)



Pet meal enhancers

(in %, US market share)



Source: NielsenIQ Retail Measurement Services

The calculation period for each year is 52 weeks ending 30 November.

Pricing trends and market expansion

For cats, the average unit price of broth is \$2.45 (€2.36), compared to \$1.99 (€1.92) for standard wet products. In volume terms, the price difference is even more pronounced: \$13.21 (€12.74) for broth versus \$3.93 (€3.79) for wet food. Toppers are typically sold in assorted flavor multipacks, with a higher average unit price than broths: \$8.11 (€7.82). For dogs, broths are priced at \$6.63 (€6.39) per unit, compared to \$4.57 (€4.41) for wet food.

The premium nature of broths is reflected in their pricing for both cat and dog products. Despite inflation, cat broth prices have increased at a slower pace, leaving room for organic growth, and this highlights opportunities for further market expansion.

Dog broths have also not experienced the same price increases as other pet segments, with prices up by just 1.8% over the past 3 years. The average volume price for dog broths actually declined by 7.4% compared to the previous year, signaling an opportunity to attract more price-sensitive consumers.

Flavors and preferences

When it comes to meal enhancer flavors, cats seem to demonstrate a strong preference for fish-based and chicken-based products, as well as the combined

chicken and tuna options. These account for almost 70% of the total broth sales.

For dogs, the flavor profile is even simpler but equally appealing, with 90% of all broth sales attributed to chicken and beef. The popularity of these traditional flavors underscores their effectiveness in enticing a dog to consume its meal.

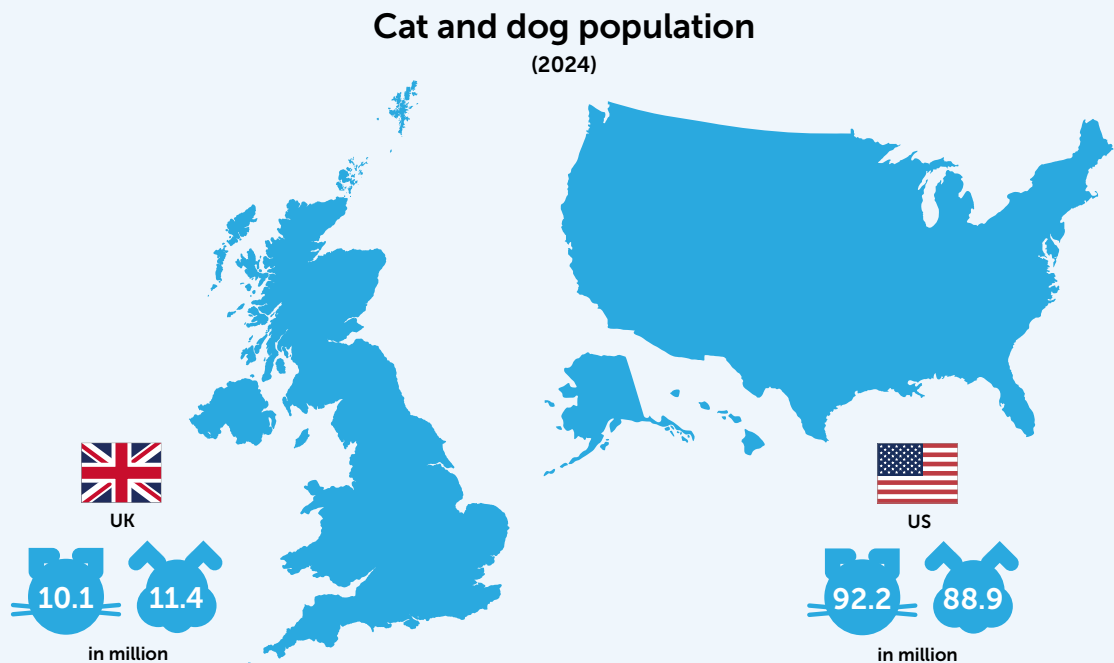
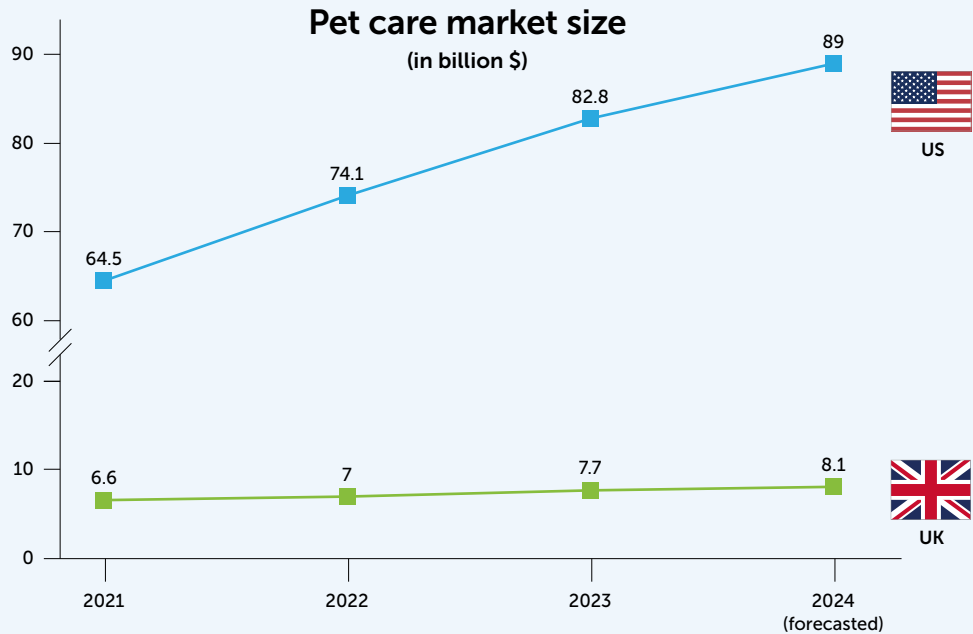
A category with a bright future

As meal enhancers continue to grow in popularity, they are reshaping the pet food landscape. Their ability to cater to a variety of pet owner needs – from improving palatability to offering indulgent treats – positions them as a category with significant potential.

Innovations in packaging, flavors and textures will likely drive further adoption, particularly among cat owners, who have already demonstrated a strong preference for these products.

For brands and retailers, understanding the unique dynamics of the meal enhancer market is a useful addition to their toolkit. By focusing on e-commerce expansion, premium product development and targeted marketing efforts, the pet food industry can unlock new opportunities within this evolving category. ♦

A snapshot of the US and UK pet industries in numbers





How New York's ban on pet sales is impacting the state's retailers

Following a wave of closures, those pet shop businesses still standing are exploring new ways to diversify as a new statewide law restricts trade in live animals.



Dan O'Connor
Business Reporter
GlobalPETS

Two years ago, the New York Governor signed the Puppy Mill Pipeline Act into law – making it illegal to sell dogs, cats and rabbits in New York state's pet shops in an effort to target unethical breeding practices by out-of-state breeders. Animal welfare groups hailed the legislation as a big win. Since then, some pet shops across the region have shut, while others have turned to supply sales and other related businesses.

Impacts on business

From 15 December 2024, when the regulation entered into force, any sale of a dog, cat or rabbit at a retail store in New York state could result in a \$1,000 (€952) fine.

With many puppies and kittens in the market costing upwards of \$1,000 (€952), shops will likely lose a significant portion of their sales revenue. Many businesses are believed to be turning to a shelter system or otherwise finding new ways to keep profits up.

At The Puppy Patch, a boutique-style pet shop in Elmira, owner Hannah Smalley is scrambling to find

ways to keep her business afloat. She tells PETS International that puppy sales make up about 75% of her sales. Now, she's working with a lawyer to figure out how to move forward as an at-home pet retailer.

Her dogs are sourced from regulated breeders, but the bill does not allow for pet shops to sell from these sources.

Intended target

Smalley admits it "blows her mind" that the law was made to target puppy mills, many of which operate under the radar. "You hear about puppy mills; you know where they are... you know about them," she says, adding that many may continue to operate even as her store faces closure.

Pet Palace in New City was forced to stop selling dogs in-store but is trying to continue selling them online. Owner Doug Staley blames heated rhetoric around puppy mills, which he prefers to call "substandard" breeders.

"It pretty much killed my business," he states when referring to the ban – and he also warns of larger implications. "Without pets, there is no pet industry."

Further consequences

Though dog breeding practices were the main driver behind the bill, even some shops that do not sell dogs have been impacted. Park Ave Pets in Rochester sells a variety of small animals. Until recently, that included rabbits. Unlike numerous dog stores, which buy dogs from mills out of state, many shops like Park Ave Pets sell rabbits sourced from local breeders.

The store's manager, Asher Hitchcock, says that while the new ban won't have a huge impact on his business, he thinks rabbit sales may be pushed "underground". He said he was "not super happy about it" and that some were confused about why rabbits were included in the ban.

Last-ditch effort

The ban took effect despite a failed attempt by several businesses to get a judge to block the law.

According to the Virginia-based Pet Advocacy Network, a similar ban in California led to increased fraudulent sales and a spike in sick puppies from unregulated sources requiring veterinary care. Days before the ban, the group filed a lawsuit on behalf of several New York businesses, but the suit was denied.

Though dog breeding practices were the main driver behind the bill, even some shops that do not sell dogs have been impacted.

"Pet sale bans hurt pets, families and small businesses," says Pet Advocacy Network CEO Mike Bober.

The association believes that the new regulation in New York state "takes away" protections for pet owners and leaves New Yorkers "more vulnerable" to fraudulent sellers on the unregulated black market.

Future of pet sales

New Yorkers looking for new dogs, cats or rabbits still have options. Private breeders will still be allowed to operate in the state and shelters typically have an abundance of pets available for adoption.

Some may still be able to get pets at classic pet stores – New York's new law includes a specific carveout for pet shops that lease their space to shelters, though cash-strapped nonprofit shelters may struggle to afford high rents pet shop owners may charge to make up for lost pet sales revenue.

It remains to be seen what longer-term impacts this will have on New York state's pet sector, as well as the welfare of dogs in the US. ♦

Legislating breeding

The movement against large industrial dog breeders in the US has led to laws being enacted in multiple states and cities. California made history as the first state to ban retail pet sales in 2017, prohibiting pet stores from selling dogs, cats and rabbits unless they were obtained from a shelter or rescue organization.

Maryland followed suit in 2018 by banning pet stores from selling puppies and kittens. The law allowed people to buy pets from a store or a breeder as long as the animal was born at the business or farm where it was sold.

Many of the nation's largest metropolitan areas, including Boston, Philadelphia and Cook County – home to Chicago – have also enacted similar bans over the past few years.



Devising strategies to ensure the supply of essential nutrients to the US pet industry



How can the US government safeguard against future shortages of the vitamins and amino acids relied on by the pet food industry? A research project aims to provide some answers.



Constance Cullman
President and CEO
AFIA

Pets, like humans, need vitamins as part of a balanced diet – without them, their health could be adversely affected. However, global supply chains continue to face challenges that ripple through industries and threaten the stability of the food and agriculture system.

Targeted analysis

One notable area of concern for the US animal food industry is that very few countries supply the world's vitamins and amino acids. This is problematic should supply disruptions occur. The Institute for Feed Education and Research (IFEEDER) has launched a research project that will develop a strategic analysis of the critical ingredients, vitamins and amino acids used throughout the US animal food supply chain.

The aim is to provide manufacturers with insights into the risks that potential supply chain shortages could have for pet and livestock health, as well as for the production of meat, dairy and eggs.

This analysis will inform the policy positions of the American Feed Industry Association (AFIA) and allow the trade association to better advocate for proactive steps the US government can take to safeguard US agriculture against potential future disruptions.

Dependence on China

The US animal food industry is heavily dependent on China, which accounts for over 70% of the world's vitamin production and 62% of global amino acid production. This exposes the sector to the volatility of global trade dynamics caused by factors such as geopolitical tensions, supply chain disruptions or manufacturing challenges.

Any disruption in China's ability or willingness to supply these essential ingredients can have significant repercussions, including for US pet food manufacturers.

Labeling issues

One reason that potential supply disruptions are particularly pronounced for pet food producers is that they face strict regulatory standards relating to minimum nutrient requirements. For US pet food to be labeled as 'complete and balanced' in the nutritional adequacy statement on its packaging, for example, it must contain specific levels of vitamins and amino acids.

Additionally, manufacturers face restrictions when modifying the formula in a way that no longer aligns with the original nutrient profile as labeled. Even if it meets the minimum nutrient requirements, the revised label must be registered as a new product with the appropriate state regulatory authorities before it can be marketed.

Further challenges for manufacturers

Disruptions in the availability of essential vitamins and amino acids could lead to significant challenges for pet food manufacturers, including reformulation, regulatory hurdles, decreased supply of products on the market and the potential withdrawal of key products. These issues would ultimately have an impact on costs, product availability and consumer choice.

A multi-faceted solution

The AFIA is urging US policymakers to take a multi-pronged approach to addressing this issue. In the last congressional session, the AFIA supported the Securing American Agriculture Act. This legislation would require the US Department of Agriculture (USDA) to study global supply chain markets for agricultural inputs – including ingredients such as vitamins, minerals and amino acids – used in feed and pet food production.

In addition, the AFIA has been calling on public-private partnerships to develop innovative solutions for boosting supply chain reliability. It has also encouraged

Disruptions in the availability of essential vitamins and amino acids could lead to significant challenges for pet food manufacturers.

policymakers to invest in domestic manufacturing facilities through tax incentives, grants and low-interest loans.

Diversifying global sourcing could also be achieved through international collaboration, partnerships with other vitamin-producing nations and the inclusion of supply chain frameworks in trade agreements.

Timely action required

Without swift action, supply chain vulnerabilities could negatively affect US pet and livestock health, agricultural productivity and economic stability. The AFIA intends to continue to work to help decision-makers understand the gravity of this issue and the importance of taking steps now to safeguard these critical inputs for US pet food and agriculture. ♦



CIPS 2025

THE 29th CHINA INTERNATIONAL PET SHOW

120+ Countries | 1,400+ Exhibitors | 70,000+ Buyers

NOV.13-16, 2025

China Import and Export Fair Complex,
Guangzhou

en.cipscom.com

 @ChinaInternationalPetShow
 @China International Pet Show (CIPS)
 @ChinaPetShow



GlobalPETS THE NETHERLANDS
Reach new partners in 2025

Are you looking to find some new partners this year?

GlobalPETS can help you reach more distributors, pet retailers and manufacturers.

Our publications (magazine and online) are read by executives in Europe and across the globe.

Curious how we can help?

Check out the media kit.



GlobalPETS
 advertising@pets.nl
globalpetindustry.com/mediakit



Company of Animals UNITED KINGDOM
Healthy, delicious and functional rewards for every dog!

Coachi Natural Training Treats are the perfect choice for training and rewarding puppies and dogs.

Created by behavior specialists Company of Animals, these grain-free, hypoallergenic treats are packed with natural goodness.

Choose from three functional variants: Puppy with prebiotics for digestive health, Dog with omega-3, turmeric and ginger for joint care, and Calming with chamomile, lavender and L-tryptophan to support relaxation.

Made with delicious flavors like chicken, fish and turkey, they're irresistible for dogs.

Sustainably packaged in 100% recyclable mono-polymer material, Coachi treats combine health benefits with eco-conscious design.

Discover how Coachi makes every training moment rewarding – available now!

The Company of Animals Ltd
 office@wearecoa.com
 companyofanimals.com

Tackling pet obesity and feeding misconceptions in the UK

While recent trends in pet health and eating habits give cause for concern, they also offer opportunities for positive change.



Nicole Paley
Deputy Chief Executive
UK Pet Food

Pet obesity is rising at an alarming rate, presenting a growing challenge for pet owners, veterinarians and the pet food industry. A 2023 London Vet Show survey among over 150 veterinarians revealed that 50% of dogs, 43% of cats, 31% of small mammals and 9% of birds are overweight. These figures have increased compared with 2014, when lower rates were reported: 45% for dogs, 40% for cats and 28% for small mammals.

Widespread misconceptions

Recent research by UK Pet Food with Kantar and Soulor Consulting of 2,500 households found that despite rising obesity rates, 77% of owners believe their pet is at a healthy weight, and only 4% acknowledge the need for weight loss. This gap highlights a significant underlying issue: owners' misconceptions about the health of their pets.

According to the vet survey, the top contributors to pet obesity are the feeding of scraps (26%), normalizing overweight pets (28%) and overfeeding treats (29%). The report uncovers how common some of these feeding habits are. 52% of UK owners supplement their pet's diet with human scraps and treats, while 22% believe that giving treats strengthens their bond with their pet.

Economic pressures have clearly influenced pet feeding practices, with 59% of owners having changed what

they feed their pets due to the cost-of-living crisis. However, only 18% weigh the food they give their pets. Furthermore, only 19% measure treats, even though treats should make up no more than 10% of a pet's daily intake.

Awareness among owners

The UK Pet Food survey of pet parents also reveals that many owners lack knowledge about pet weight management, with 15% guessing their pet's weight. Only 7% know how to check their pet's body condition properly. Moreover, 50% have never sought veterinary advice on weight management.

However, there is hope, because 70% of pet owners agree that commercially prepared pet food is better than homemade diets. This presents a starting point for providing better guidance.

Feeding sustainably and responsibly

When asked about pet food packaging, 38% of owners in the UK said they read and understand guidelines on pet food packaging.

However, a sizeable proportion find terms like 'derivatives' (21%) and 'byproducts' (22%) off-putting. Reflecting growing environmental awareness, 21% said they try to feed their pets sustainably.

These insights highlight a need for clearer communication and better educational efforts from pet food brands to improve transparency and trust. ♦



Country report: Australia

The shape of the pet industry 'Down Under'

From ownership trends to a shakeup in the retail landscape, it's a good time to take a closer look at the latest developments, challenges and opportunities influencing pet businesses across Australia.



Caroline Zielinski

Contributor

PETS International

Some 69% of Australia's households currently own at least one pet (up from 60% before COVID) and, according to a recent survey by multinational Mars among more than 20,000 pet owners across 20 countries, Australians have high levels of satisfaction with cat and dog ownership. In fact, 55% of dog owners in Australia rate their satisfaction as 10 out of 10, compared with the global average of 51%.

Gen Z owners are big spenders on pet care

There is a strong emphasis on pet health among owners, which has spurred growth in veterinary care, insurance and preventive health products.

A survey by comparison tool Finder among more than 600 pet owners concluded that Australians now spend an average of A\$826 (€499/\$519) annually on vet services. Gen Z owners are the biggest spenders at A\$1,184 (€715/\$744), while baby boomers spend the least on vet care (A\$505 [€305/\$317] in the past 12 months).

The Finder survey also revealed that 94% of Australians would pay money to save their pet from being put down, with 8% prepared to fork out over A\$10,000 (€6,039/\$6,281) on life-saving treatment. On average, Gen Z pet owners would spend more than A\$7,500 (€4,530/\$4,711) to save a furry friend, while baby boomers would only spend about A\$2,700 (€1,631/\$1,696).

Rising trends in nutrition and technology

Specialized nutrition, supplements and grooming services are also popular in the country. A recent survey by Melbourne-based non-profit organization Food Frontier found that 47% of dog and cat owners in Australia are open to changing their pet's diet due to ethical, health and environmental concerns.

Technology adoption among pet owners is accelerating, with 1 in 5 Australians believed to monitor their pets via video cameras. Overall, that amounts to 1.4 million Aussie households that have installed pet cameras. Millennials lead this trend; almost 28% admit to monitoring their pets remotely, compared to 20% of Gen X owners.

National retail players

In 2022, Woolworths Group – Australia's largest retail group – expressed its intention to acquire a 55% stake in Petspiration, the owner of retail chain PETstock. Following an investigation by the Australian Competition and Consumer Commission (ACCC), the deal was eventually allowed to go ahead in late 2023, provided that PETstock divested some of its assets.

55% of dog owners in Australia rate their satisfaction as 10 out of 10, compared with the global average of 51%.

To comply with these terms, PETstock sold 41 specialty pet retail stores, 25 veterinary hospitals, 4 brands and 2 online retail stores – including the Best Friends and Our Vet brands, My Pet Warehouse brand and online store, and the Pet City brand and stores – to PetO, a family-owned and family-operated business based in Sydney.

A credible new competitor

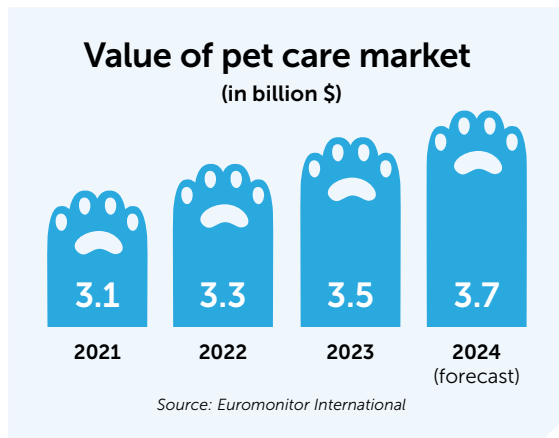
The move tripled PetO's revenue to a reported A\$200 million (€121M/\$125M), and expanded the chain's network from 17 retail stores in New South Wales only, to 58 retail stores across the country, including in Victoria, Queensland, Tasmania and Western Australia. This has created a sizable new competitor in the Australian pet retail landscape.

"The ACCC picked up the sense that Australia was heading towards a duopoly in the pet market... and what consumers want more than anything is a healthy choice and a credible third alternative," says PetO co-founder Nick Greenhalgh. "If you only have a choice of two, and one is owned by Woolies and the other by private equity, it's not always your desired choice."

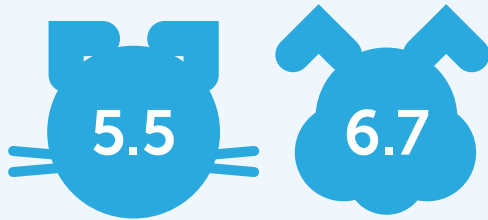
PetO spent the second half of 2024 rolling out its brand across the newly acquired stores. "We now have nearly 1,000 colleagues around Australia, which means we have a bit of harmonization to do," commented Greenhalgh shortly after finalization of the deal. At that time, his aim was to be 95% rebranded by the end of last year.

E-commerce still on the rise

As in other countries, online shopping skyrocketed in Australia during the COVID lockdowns, firmly establishing itself as the 'new normal' in consumers' eyes, and pet owners are no exception. According to e-commerce data analytics site ECDB, the monthly online revenue of the Australian pet supplies market was A\$73 million (€44M/\$46M) in November 2024 – a rise of 16% compared to October 2024. [▶ SEE NEXT PAGE](#)



Australia's pet population (2024, in million)



Source: Euromonitor International

The Australian pet supplies e-commerce market was on track to hit A\$761.66 million (€458.99M/\$477.2M) by the end of 2024, making up 8% of the country's hobby and leisure e-commerce market. And with an annual growth rate of 9.6% over the next four years, it's expected to grow to A\$1,100.28 million (€663.22M/\$689.4M) by 2028.

In-store advice remains key

Big names such as Pet Circle, Woolworths, PETstock and PetO currently dominate the e-commerce business. However, these local players face stiff competition from global giants like Amazon, Temu and Shein, which leverage extensive distribution networks and rock-bottom prices to entice consumers and win market share.

Greenhalgh isn't too worried about this development, however. In addition to its e-commerce presence, PetO is also focused on providing a great customer experience in its bricks-and-mortar stores.

"We are Australia's largest store for dogs and cats... we devote more than 90% of our floor space to dog and cat supplies, which means we offer customers a much greater product range in those categories," he says. "Because we focus mainly on those animals, we are able to buy in bulk, have big warehouses and are able to pass on the savings we get as a result to the consumer."

He explains that Australians are so attached to their pets that they value expert advice about their care and diet – and this is only available when shopping

in stores. "People walk into our stores armed with more questions than answers, and because of that we need to give them more authoritative answers than just what's on the package," he says.

Speed of delivery is a growth area

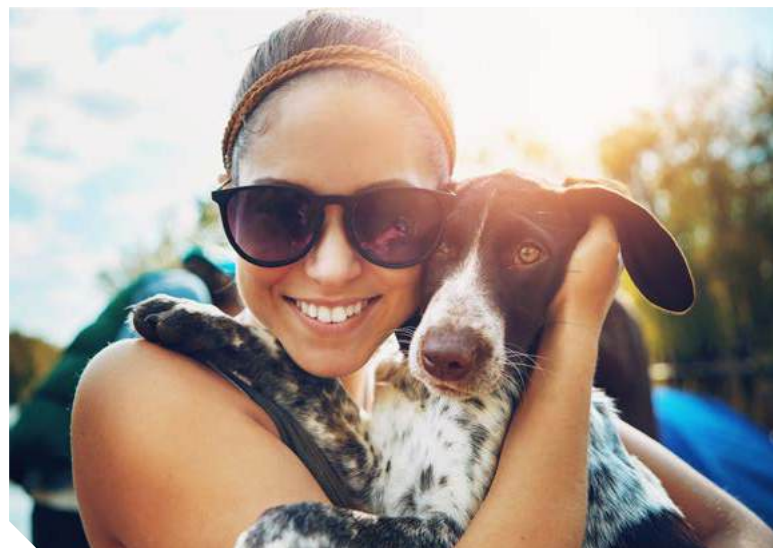
Additionally, to compete with global operations such as Amazon or Temu, PetO offers a 2-hour service for web purchases. According to Greenhalgh, this is especially popular for deliveries of pet food.

"One area in e-commerce that is growing is speed of service, and a lot of our sales are now through the 2-hour delivery model. At the end of the day, up to 30% of pet owners run out of food, and there are only so many places you can get it, especially if it's premium food, which is only sold in specialty stores," he comments.

Industry demonstrates resilience

As for the broader pet supplies retail industry, he says it remains resilient despite cost-of-living pressures. "People are really preserving their spend on children and pets, and from our clinics we can see there is still an appetite to adopt pets," adds Greenhalgh.

While people may be dropping some discretionary purchases such as pet accessories and beds, the appetite for premium food and pet care remains strong, he concludes. ♦





Zoomark 2025: expanded, yet sold out

Zoomark's 21st edition sold out early, even with the addition of a 10th hall and the expansion of the event to 90,000 sq m. Let's find out what's new for one of Europe's leading pet industry events.

The 21st Zoomark, the international trade show for pet food and pet care, will be held at BolognaFiere in Italy on 5-7 May. Popular features will return, but there will also be some event firsts to look out for.

Thematic paths

This year's Zoomark has a new layout – bigger and even more functional. It's been designed to help exhibitors and visitors get the most out of the event, with a more engaging and efficient floor plan to improve the experience for all industry professionals who make the trip to Bologna.

The event will focus on sustainability, innovation and quality, with thematic paths that will optimize the visit, while ensuring a steady traffic flow to all exhibitors.

Special areas

The 2025 edition of Zoomark features 5 specially themed areas, all designed to anticipate new trends and innovations in the pet industry and aimed at boosting and facilitating business:

- **Factory:** a brand-new area for supply chain companies
- **Atelier:** hosting the very top of the range in pet wellness and comfort
- **Next 5.0:** focused on pet tech and showcasing advanced solutions for pet health and safety, and featuring both startups and established firms

- **Aqua Project:** putting the spotlight on the aquarium and terrarium sectors, with training and educational sessions for retailers
- **Pet Vision:** dedicated to recent product launches and trends, including a competition for the best innovations

Buyers from throughout the world

One of the key assets of a successful trade show is undoubtedly the attendance of major buyers. A partnership with Italian Trade Agency offices in key pet industry markets will bring more international buyers to Bologna.

And Zoomark has boosted its International Buyers Program to help connect supply and demand, adding new activities designed to guarantee the presence of a growing number of selected top buyers from the main and emerging markets.

The program includes dedicated services to encourage direct interaction between buyers and exhibitors. Thanks to the B2Match matchmaking platform, buyers and companies will be able to prepare for the show in advance, and plan and manage their personal schedule of meetings. ♦

**For more information
go to zoomark.it**



The cat accessories market gets smarter



The rise of technology is revolutionizing how owners interact with and care for their pets, and many of today's cats have at least one electronic accessory.



Ivana Crnec
Contributor
PETS International

The global pet accessories market is forecast to rise from 2024's \$72.5 billion (€70.1B) to \$116.2 billion (€112.4B) by 2030, a compound annual growth rate of 6.98%. This is driven by the surge of pandemic cats, pre-pandemic lifestyle nostalgia and pet humanization going viral.

High-tech epicenters

A survey presented at the American Veterinary Medical Association (AVMA) Veterinary Economic and Business Forum last October showed that cat owners had spent slightly more on pet care and accessories than in 2023, with Capital One Shopping Research reporting that the average US household spent \$876 (€847) on pets in 2024.

In Europe, pet accessories are estimated to be worth \$1.2 billion (€1.16B). At the same time, per capita cat accessory expenditure has increased in East Asia, where the digital cat accessories markets in China, Japan and South Korea are booming, due to raw material abundance and low production costs.

Smart solutions for keeping in contact

An electronic cat accessory aims to provide smart solutions for everyday problems. This is achieved by product innovation and upgrading existing products.

Interactive monitors and pet cameras with two-way communication systems remain the most popular cat accessories.

"Technology is transforming how we care for our pets, making it easier to stay connected. We focus on creating accessible smart monitoring systems that bring peace of mind to pet parents," says Yulia Popyk, Brand Manager at pet technology firm Petcube.

App developer Harmonic Soft now has a pet video-calling mobile app called Pet Phone. This allows pet owners to Skype with their cats using advanced Voice over Internet Protocol (VoIP) technology. In 2024, pet collar maker Kestanlora launched a HD 1080P cat camera collar, giving owners a front-row seat for their cat's daily adventures. Meanwhile, the Tractive smart collar available for dogs and cats, has integrated GPS tracker and offers health alerts.

Intelligent health and welfare support

Catlink, a Chinese company specializing in intelligent cat devices, grew by 39% last year. Its founder, Zhang Xiaolin, says: "We've witnessed the progression from automation to intelligence and now firmly believe in the path of digitization and health consciousness."

FluentPet shook the industry when it released Cat Talking Buttons, an interactive board that allows owners to communicate with their cats while providing mental stimulation and reinforcing learning. Fellow

US business Pet Acoustics has created a multisensory speaker for cats, pre-loaded with calming music. German developer Catus has designed the Groomatic automatic cat brush that is attached to the wall, is motion-activated and supports coat health.

US-based Litter-Robot makes self-cleaning litter boxes for cats, while the UK's Sure Petcare designs and manufactures smart doors that work only when in contact with the connected cat's microchip. Petwant, known for its range of electronic pet feeders, has created a cordless water fountain with a smart sensor and filtration system.

E-commerce popular for accessories

Since the pandemic, cat owners' online shopping habits have accelerated notably. eTailPet says that the pet e-commerce market has quadrupled in size since 2013. Customers favor online pet shopping because it offers excellent product selection, fast shipping and competitive pricing. Plus, it's much easier to compare the features and costs of electronic and digital cat accessories online.

The general interest in smart cat feeders has grown by over 40% since 2020, with as much as 64,000 searches a month, according to a November 2024 Meet Glimpse trends report. Social media was buzzing about the high-tech accessory, and it peaked in popularity on TikTok and YouTube. The virtual shelves of online pet retailers were soon overflowing with automatic cat feeders.

Peeking into the future

With so many revolutionary cat accessories, 2025 is shaping up to be an exhilarating year for the sector. Powered by pet owner demand, it is creating not fads but global long-term trends. And the future of digital pet care is looking bright with electronic and digital cat accessories set to see continued growth.

"Combining engaging interactive technologies with tools that monitor and improve pet wellness, we can create innovative solutions that help owners proactively care for their [pet's] health," says Marko Kadunc, CEO of PetsPemf, which manufactures pulsed electromagnetic field therapy mats for pets. ♦

Cutey®

LOOKING FOR DISTRBUTORS AND PRIVATE LABEL MANUFACTURERS



شركة تمولين الشرق للتجارة
ORIENT PROVISION & TRADING CO.

Orient Provision & Trading Co. Po. Box 11035, Jeddah 21453, Kindom of Saudi Arabia.
Head Office Jeddah, Tel: +(966) 12 699 0999, Fax: +(966) 12 660 9201, Email: optc@optcl.net



wanpy®

- Grain free
- Made with real meat
- 97% Cats love it!



Safe, Delicious & Healthy Cat Treats

Pets are our friends and part of our family



Head Office: Yantai China Pet Foods Co., Ltd. STOCK CODE: 002891 Angie@wanpy.com.cn www.wanpy.com.cn

Wanpy Europe Petfoods B.V.

Martien van Bohemen

Mbl.: +31 6 23375988

martien@wanpy.eu



Sluggish sales and online competitors push pet accessories retailers to adapt

Companies are developing new strategies in the face of a growing threat from e-commerce giants alongside shifting consumer spending trends.



Dan O'Connor
Business Reporter
GlobalPETS

Retailers are adjusting their expectations as sales of various pet accessories have slowed. The latest financial trends paint a clearer picture of how the industry is adapting to the change and offer hope of a rebound in 2025.

Less expenditure

Unlike consumable goods like food and medicine, which remain necessary through the life of a pet, discretionary goods are a tougher sell. Buying one lead could mean a pet owner doesn't need another for years. The same goes for beds and clothes, which can last a long time but are not essential to the health and wellness of a pet.

Inflation weariness could also be helping to slow down sales of accessories, even as the rate of inflation cools globally.

A 2023 survey by PETS International and Yummypets found that the high cost of living affected the financial situation of 85% of pet owners in France, Canada, the US and the UK. The research also found consumers were most willing to cut back on treats (24%) and toys (22%), with a further 10% saying they cut spending on leashes or collars.

Countering the competition

Additionally, pet retailers have recently faced new competition in accessories, mainly due to the increased availability of cheap alternatives online.

Chinese e-commerce mega-retailers such as Temu and Shein offer a wide variety of pet accessories, from leads to grooming tools, at extremely low prices, some for less than \$2 (€2). As consumers remain tired of high costs, they may turn to these retailers for pet supplies when it comes to discretionary spending.

Absolute Pets, the largest pet retailer in South Africa with over 100 stores, is feeling this trend. ► [SEE NEXT PAGE](#)

In response, the Cape Town firm is considering new kinds of 'entry-level' goods – stripped-down versions of its typical products that could sell at lower prices.

It has also redoubled its efforts on social media and marketing, and in educating its workforce to push its higher-quality goods. "Previously, when the economy was a lot more flush, we didn't have to focus so much on those things," states Tonia Polderl, Planning Manager at Absolute Pets.

Polderl says that the pet retailer has put extra focus on all the basics "because of the crunch", at the same time admitting that the price points offered by the e-commerce Asian giants are tough to compete with.

US retailers feel the squeeze

Some US-based pet retailers are also feeling the pressure. Central Garden & Pet's pet segment posted a 2% year-on-year (YoY) decline in net sales for the financial year (FY) 2024.

With a forecast to return to profits late this year or in 2026, company CEO Niko Lahanas notes that the company is struggling to compete with the likes of Shein and Temu.

This has cut into the company's sale of durable products like accessories. Thanks in part to the newly popular competition from abroad, Central's pet sector sales of durables are down double digits.

Chinese e-commerce mega-retailers like Temu and Shein offer a wide variety of pet accessories, from leads to grooming tools, at extremely low prices.

Finding strategies to fight back

American pet retail chain Petco has also been promoting high-quality goods to overcome sluggish sales. CEO Joel Anderson recently told investors that offering 'trend-ready' products was key.

"It's a truism I've seen through my decades in retail that if we present our customers with unique and trend-right products, we'll accelerate our return to retail excellence, meeting pet parent needs and getting back to the heart and soul of pet parenting," he says.

Some retailers are more insulated from the downturn in accessory sales. Services have been particularly strong, helping buoy many companies' profits through the downturn.

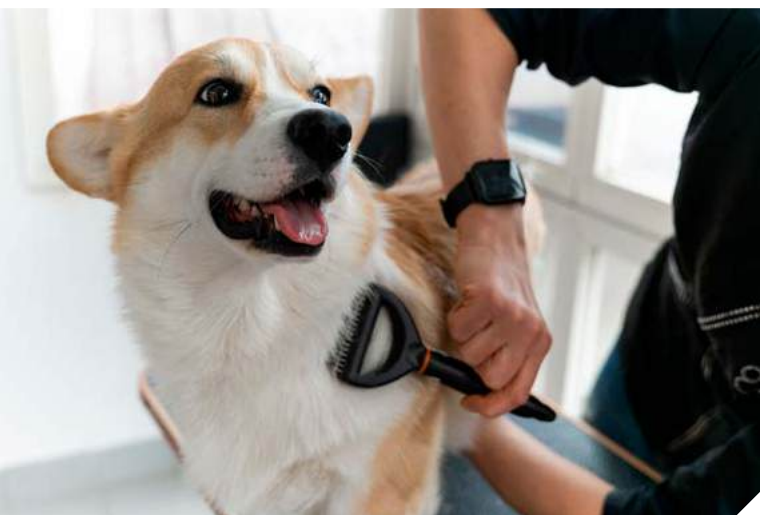
At Petco, for instance, net revenue from services increased 10% between July and September 2024. This includes mobile vet clinics and grooming services, which marked a bright spot in an earnings report that showed a negative 5% growth in discretionary sales.

The road ahead

With the newly elected Trump administration in the US, some in the pet industry have raised concerns that tariffs could slow growth, including in the already struggling accessory market. While it's unclear what impacts any future tariffs may have, some companies like Chewy have publicly breathed a sigh of relief – most of their suppliers and sales are based in the US, insulating them somewhat.

However, as inflation continues to fall from its historic high, there is reason to hope for a return to normal in the pet accessory market. The larger trends driving industry growth have not gone away.

At Absolute Pets, accessory sales have started to tick back upwards in recent months after 18 months of poor returns. "From what we've seen, we're hoping [growth] continues going forward," concludes Polderl. ♦



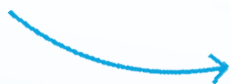
Reflex[®] PLUS

Tailor-Made Perfection

Super
Premium
HYPOALLERGENIC
Breed
Series



available in
fillet & pate



NEW!

REAL SARDINES, BOLD FLAVOUR.

SUPERIOR AROMA • GRAIN FREE • MINIMALLY PROCESSED



schesir[®]

SCHESIR.COM

