



The Pet World in 2025

2025 Trends & a Look Back at 2024

SPINS Retail Insights

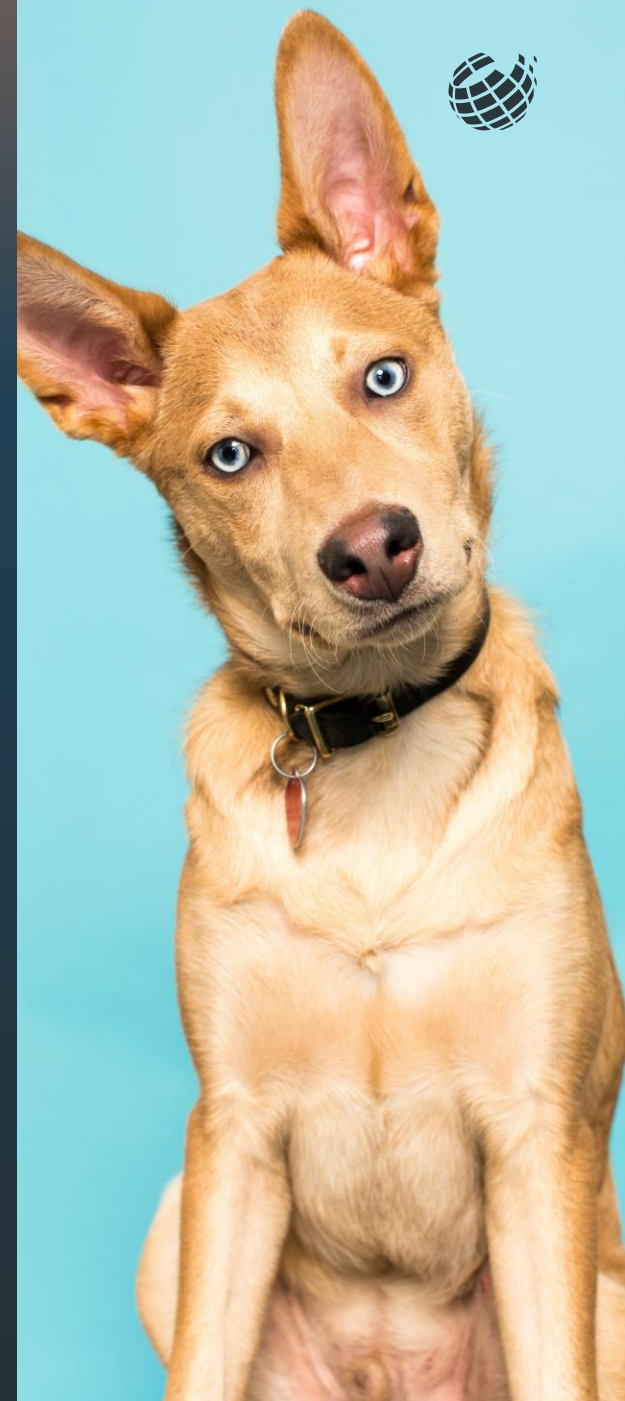




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Pet Parent Expectations Heading Into 2025

Younger shoppers are reshaping the pet industry, demanding wellness-focused, transparent, and sustainable products. Natural, eco-friendly, and functional pet goods are booming, making value-driven brands the future of the market.

Value Oriented Movement

Within our industry, new values-based consumers are joining the movement. They are spending more and buying more often.



With younger shoppers even further favoring natural, wellness and transparency, there are strong consumer preference tailwinds expected for years to come.

Gen-Z & Millennials Had the greatest increase in pet adoption & ownership during COVID

Millennials Currently have the highest rate of pet ownership

Younger shoppers are building momentum

Younger Millennials and Gen Z are more values-driven than their predecessors and shop with their values. They are gaining purchasing power quickly.

2030

“Zennials” will hold 47–60% of buying power

And they shop with their values, favoring people and planet as well as health



Reflecting on 2024: A Year in the Pet Industry

What were the key developments and trends that shaped the Pet Industry in 2024?



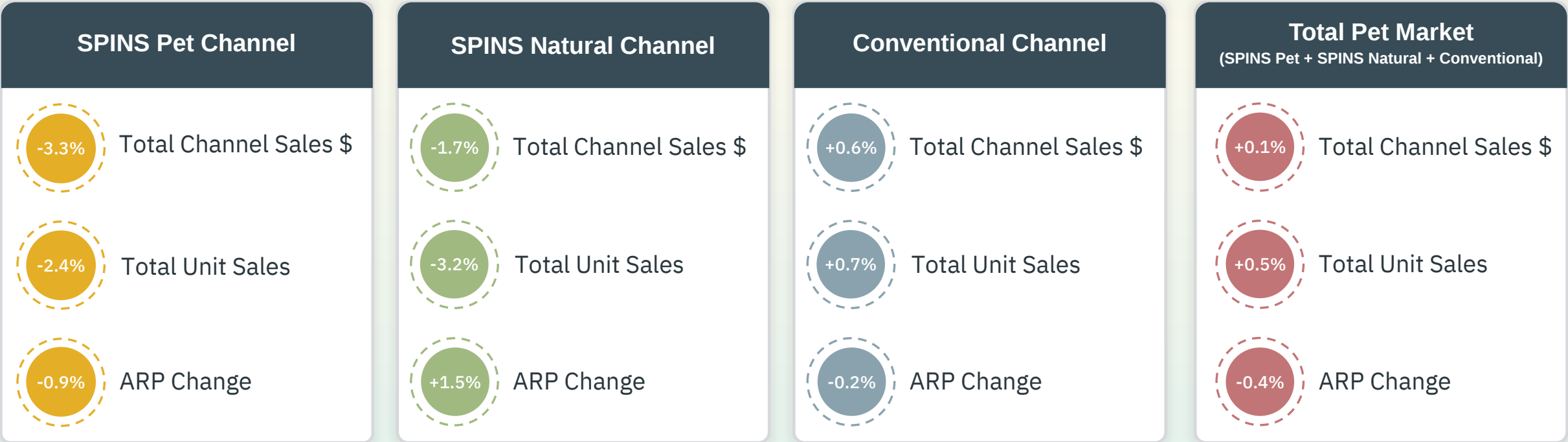


The Pet Industry Across Channels

In 2024, the pet industry remained steady, with sales, units, and prices showing little change. Pet parents focused on the essentials in their purchasing, keeping demand stable and spending habits consistent despite ongoing costs.

Pet Department Channel Sales

52 Weeks Ending 1/26/25



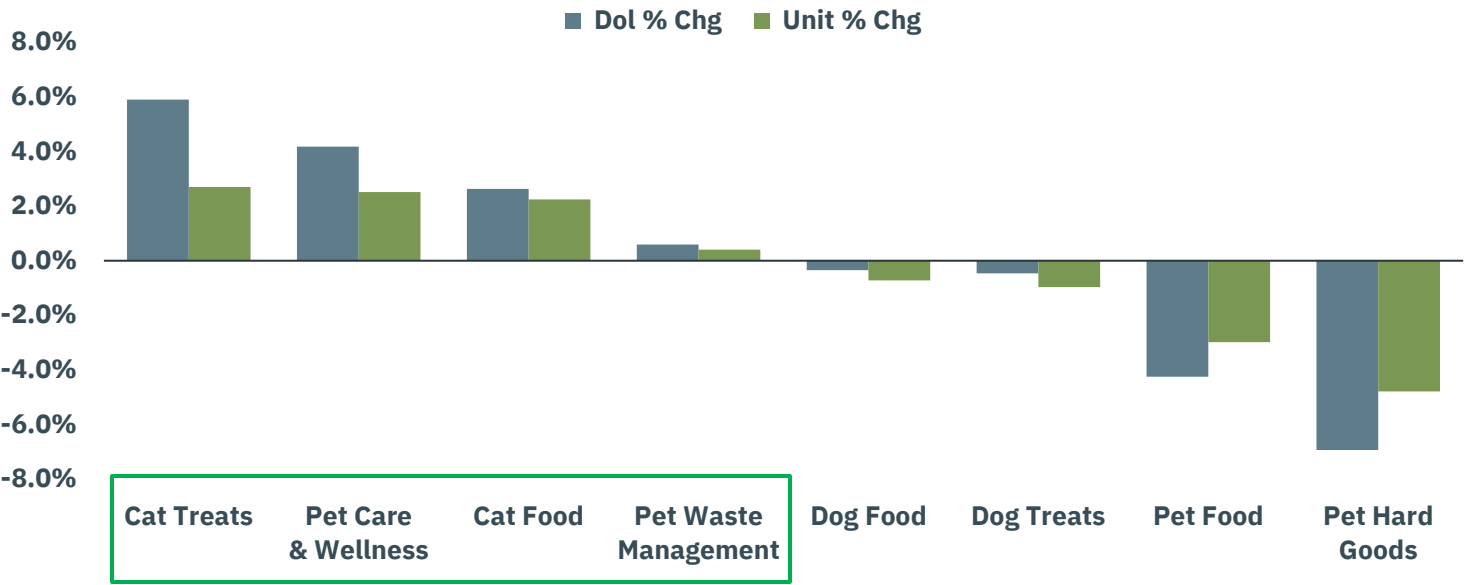


Wellness & Essentials Take the Lead in Pet Spending

Pet parents are focusing more on **health, wellness, and smarter spending**, with **cat products and pet care growing**, while **dog food, treats, and hard goods decline**, showing a preference for **better nutrition, functionality, and sustainability**.

Total Pet Market, Category Sales

52 Weeks Ending 1/26/25



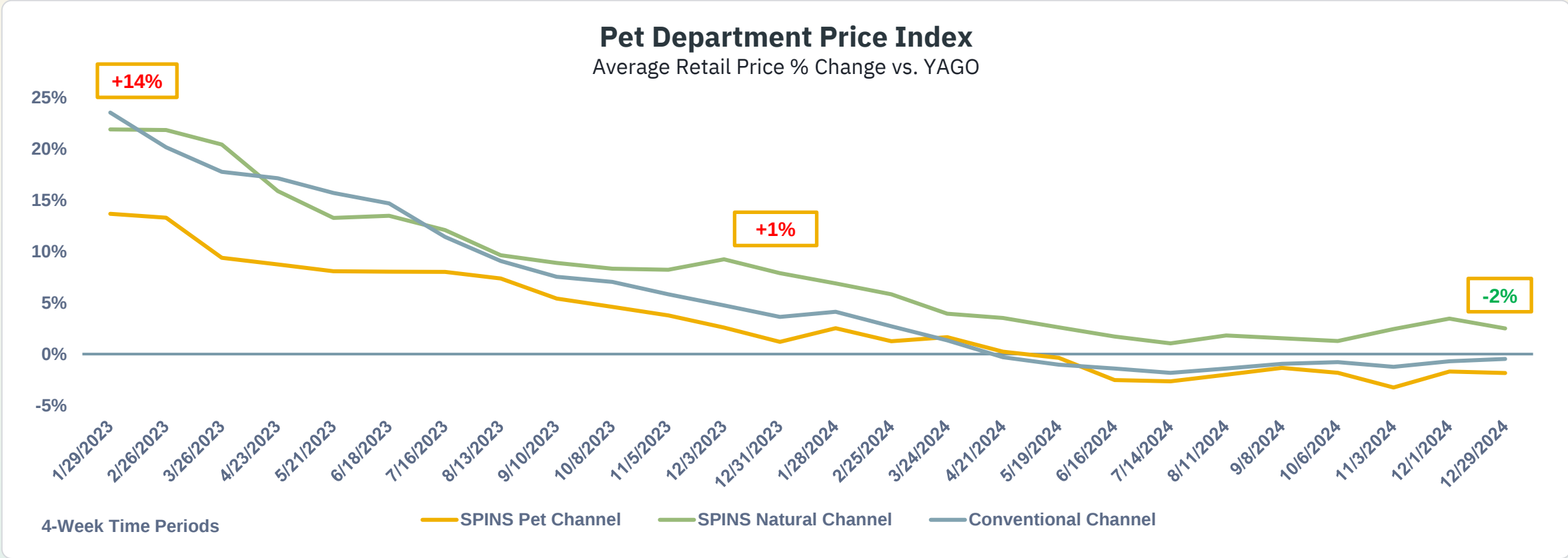
Key Themes for Exploration Entering 2025*

- Brand:** A strong, clear brand is key for building lasting loyalty in the pet industry.
- Personalization:** Tailored marketing boosts trust and makes pet parents feel in control of their choices.
- Retail:** Pet shopping needs to be more engaging to compete with convenient subscriptions like Chewy.
- Sustainability:** Transparency in sustainability is crucial—greenwashing undermines trust in both products and the industry.
- Technology:** Utilize technological advancements in at home monitoring and tracking leashes



Pet Inflation Cools – Relief at the Checkout

Pet products saw a **slowdown in pet-flation** after years of sharp price increases, especially from 2021 to 2023. By the end of the year, **pet-related expenses had stabilized**, offering much-needed financial relief to pet owners.



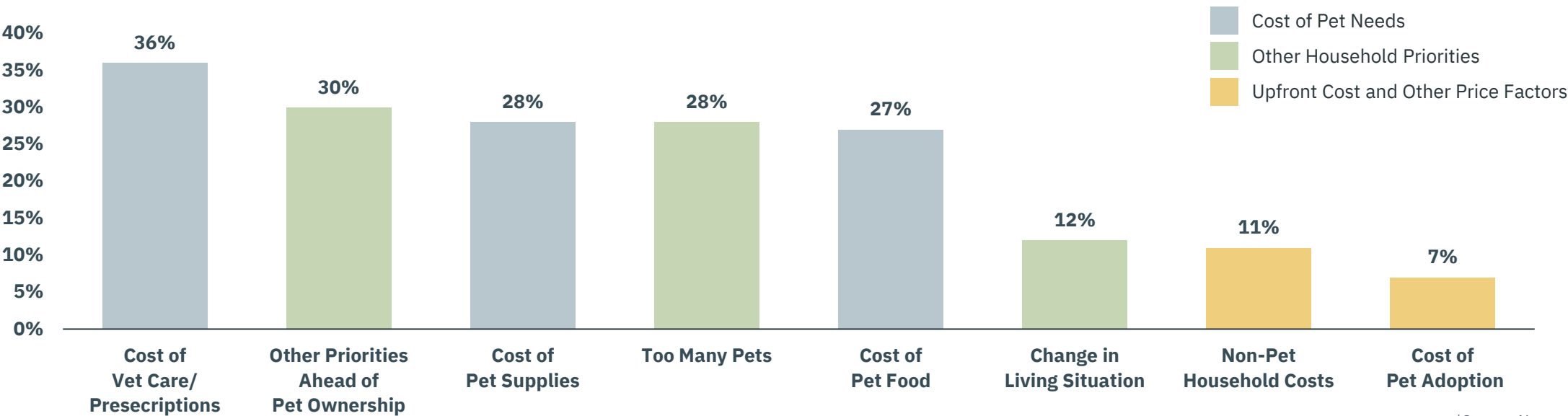


Inflation's Paw Print: The Landscape of Pet Spending

Although pet-flation is easing, pet owners are **less likely to add another pet** due to the **rising costs of pet care**, with **veterinary bills** being the biggest concern, along with overall spending increases in the pet industry.

Reasons for Being Less Likely to Add Another Pet to Household*

Among those Less Likely to Add Pets to Household | % of Respondents

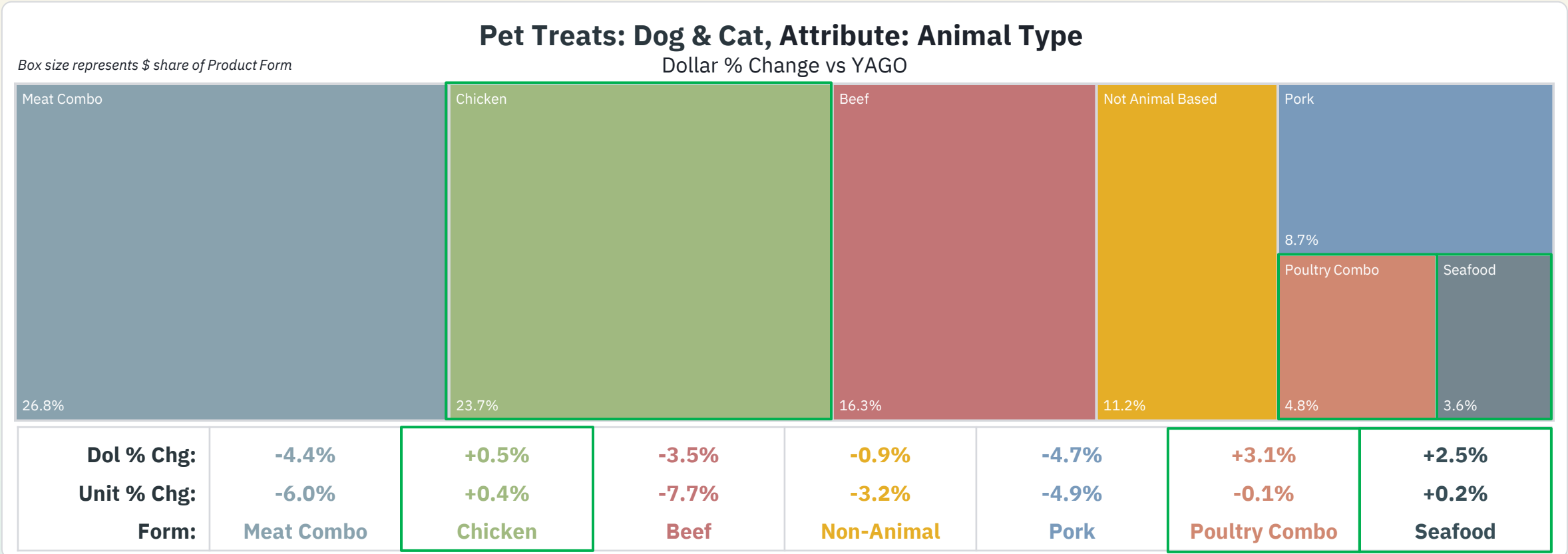


*Source: Numerator



Pet Treats on the Move: Changing Protein Choices

Pet parents are **exploring new protein options**, with **poultry combos** (+3.1%) and **seafood** (+2.5%) growing, while beef and non-animal treats decline—showing a **shift toward variety and alternative proteins**.



Connecting The Dots: Humanization In Focus

How are pet parents prioritizing humanization through Pet Food and Pet Care & Wellness?





From Pets to Family: The Humanization of Pet Products

Pet humanization is driving **innovations in gourmet treats, premium ingredients, and personalized care**, with pets enjoying the same indulgence as family members through **tailored products and luxury offerings**.

The Driving Force

93% of pet owners in the US consider their **pets to be family members** ¹

73% of households own a pet in the US ²

Younger generations drive change: Younger pet parents prioritize their pets' well-being, treating them as family.

As a result, the younger generations look for different **brand attributes and engage in product exploration**.

1: Packaged Facts 2024
2: Mintel Data

Setting The Standard For Human Grade



Look for the Human Grade Label, along with traceability and lab safety batch tested



Every ingredient must be safe for human consumption, including supplements.



Produced in facilities licensed for human food manufacturing.



Processed, stored, and handled according to FDA human food safety regulations.



Must be labeled as pet food despite meeting human food standards.

Idea Pet parents are shopping labels, partner with brands that are aligned with sustainability, traceability, and human grade pet food



Feeding Pets Like Family: Connecting Through Food

As pet parents seek the best for their furry companions, **raw, freeze-dried, and refrigerated pet foods** are rising in popularity, offering **high-quality, natural nutrition** that mirrors the **fresh, wholesome diets** humans choose for themselves.

Raw Food

+5.6%
Dol % Chg



Raw Pet Food offers unprocessed, high-protein ingredients like meat, bones, and organs, providing natural, nutrient-rich meals that support digestion, weight management, and coat health, similar to benefits of whole, unprocessed foods for humans.

Freeze-Dried

+6.8%
Dol % Chg



Freeze-Dried food retains the nutrients of raw ingredients and gives pets fresh, nutrient-rich meals without needing refrigeration. Packed with the same healthy benefits humans get from quality foods, just pour bone broth to rehydrate!

Refrigerated

+18.5%
Dol % Chg



Refrigerated And Frozen Pet Food use fresh, minimally processed ingredients, avoiding preservatives and artificial additives. whole-food offers balanced meals with proteins, vegetables, and grains; “farm-to-table”.

 **Idea** Set up in-store sampling stations or educational displays to showcase fresh, freeze-dried, and raw pet food options, helping pet parents discover premium, human-grade nutrition for their pets.



Paws and Palates: Elevating Treats With Inspired Flavor

Dog treats are being **elevated through humanization**, with gourmet **options inspired by human cuisine**, featuring trendy flavors, wholesome ingredients, and culinary innovations that **cater to the tastes and values of modern pet owners**.

Bocce's Bakery



Bocce's Bakery offers all-natural, oven-baked treats that bring a wholesome, human-inspired twist to dog snacking. Bocce's treats are crafted with love and creativity, featuring fun flavors for our pets, like *Pizza Our Heart* and *Berry Sorbet*.

Earth Animal



Earth Animal chews take inspiration from human cuisine, offering dogs an indulgent yet healthy snacking experience with unique flavors like *Bacon Cheeseburger* and *Strawberries & Cream*. Made from natural, ethically sourced ingredients.

Three Dog Bakery



Three Dog Bakery offers a wide range of handcrafted treats, from savory quiches to creamy peanut butter bites, all free from artificial additives. These bakery-style goodies combine quality, creativity, and care, providing your pup with a delicious taste of the good life.

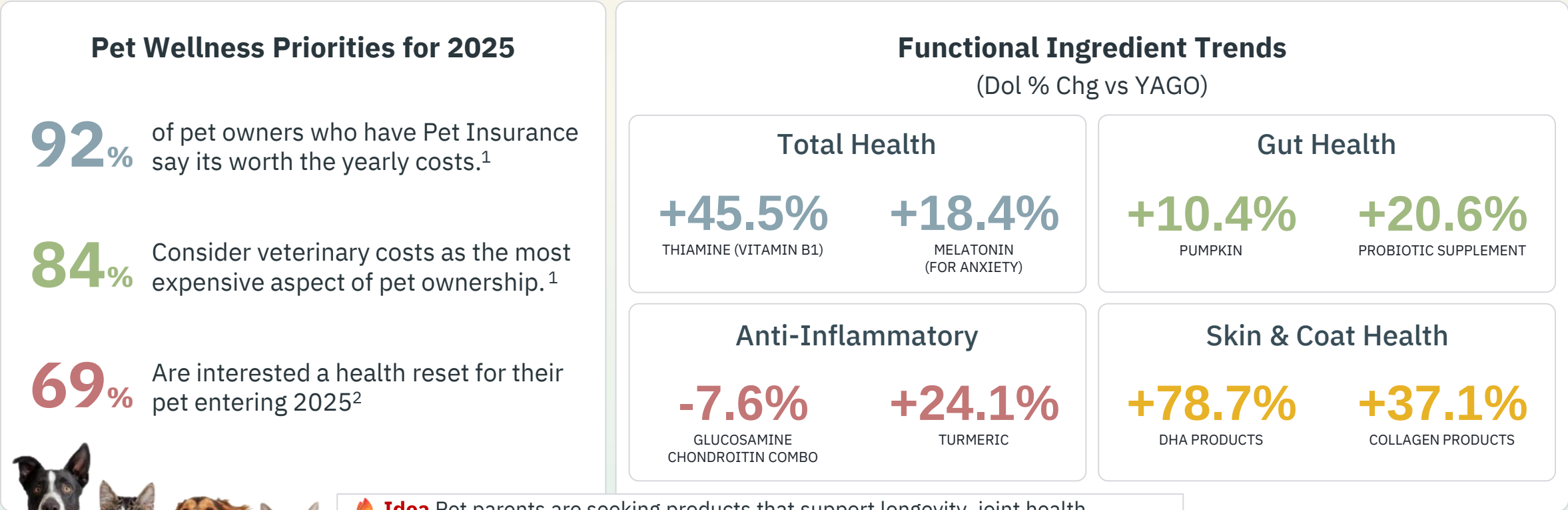
 **Idea** Fill your shelves with exciting flavors and innovative treats that delight pets and keep both pets and pet parents coming back for more!





Pet Care & Wellness: What Matters Most in 2025

Pet parents are prioritizing **proactive health solutions**, seeking products that **support longevity, joint care, digestion, anxiety relief, and skin & coat health** to enhance their pets’ overall well-being.



Idea Pet parents are seeking products that support longevity, joint health, digestion, and skin & coat care. Align your assortment with these key health benefits.

Connecting The Dots: Humanization In Focus

Made for Your Pet: Fresh, Personalized Nutrition

Pet parents want the same **personalized nutrition** for their pets that they seek for themselves, driving demand for **customized, high-quality diets** that **support health and longevity**.



What Makes Personalized Nutrition Unique?

Allergy Management: Custom diets remove common allergens like wheat, corn, and soy, helping pets avoid food sensitivities.

Weight Control: Tailored meals provide the right portions and nutrients to support a healthy weight.

Convenience: Personalized pet food services deliver fresh, ready-to-serve meals straight to your door.

Preventive Health Focus: Most pet parents (88%) see customized nutrition as key to keeping their pets healthy.

Subscription Popularity: Nearly half (49%) of pet owners use pet food subscriptions for easy, hassle-free feeding.

Pet Personalization Through Meal Services

**NOM
NOM**
**JustFood
ForDogs.**



Ollie

SPOT & TANGO

 **Idea** Retailers can set up an in-house kitchen to craft fresh, customized pet food tailored to customer needs, with convenient in-store pickup or local delivery options.

Innovation and Sustainability: The New Standard in Pet Care

How are pet parents embracing sustainability and technology to enhance their pets' well-being?





Sustainability Practices Shaping the Future of Pet Care

Pet parents are seeking eco-friendly options, driving demand for sustainable pet products like sustainable cat litter, biodegradable waste bags, plant-based food, and recyclable packaging as brands embrace greener practices.

Sustainable Cat Litter

Many pine and wood cat litters repurpose lumberyard waste, turning discarded materials into sustainable, eco-friendly solutions. By upcycling these byproducts, they help reduce overall waste while providing a low-dust option that improves air quality—beneficial for pets and owners with allergies.



+32.5%

Dol % Chg
Cat Litter –
Paper/Pine/Wood

Sustainable Packaging

Pet Parents, specifically younger parents are willing to pay a little bit more to ensure their pet food products are leveraging sustainable packaging. 54% of these younger consumers will base their purchasing decision on sustainable packaging



 **Idea** Retailers can meet growing demand by offering eco-friendly pet products, such as sustainable packaging and plant-based options, as more pet parents prioritize sustainability in their purchases.



Smart Pet Care: Innovations Transforming the Pet Industry

Innovations in pet technology are making care easier and smarter, with AI-powered feeders, health trackers, automated cleaning devices, GPS collars, and telehealth services improving pet wellness and convenience for pet parents.

Smart Collars

With quality of life as the priority, smart collars give pet parents a seamless way to track their pets' vital signs, safety, and activity levels.



Pet Cameras

As more pet parents head back to the office, pet cameras provide a way to check in on anxious pets, talk to them, and even toss treats for extra comfort.



Automated Litter Boxes

Automated litter boxes keep things cleaner, control odors, and save busy pet parents time, making pet care easier than ever.



 **Idea** Retailers can stay proactive by offering smart pet care products like AI feeders, health trackers, and GPS collars to meet the demand for tech-driven pet wellness solutions.



THANK YOU!

Reach out to

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with any questions

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