

SPINS | Indiepet Quarterly Update

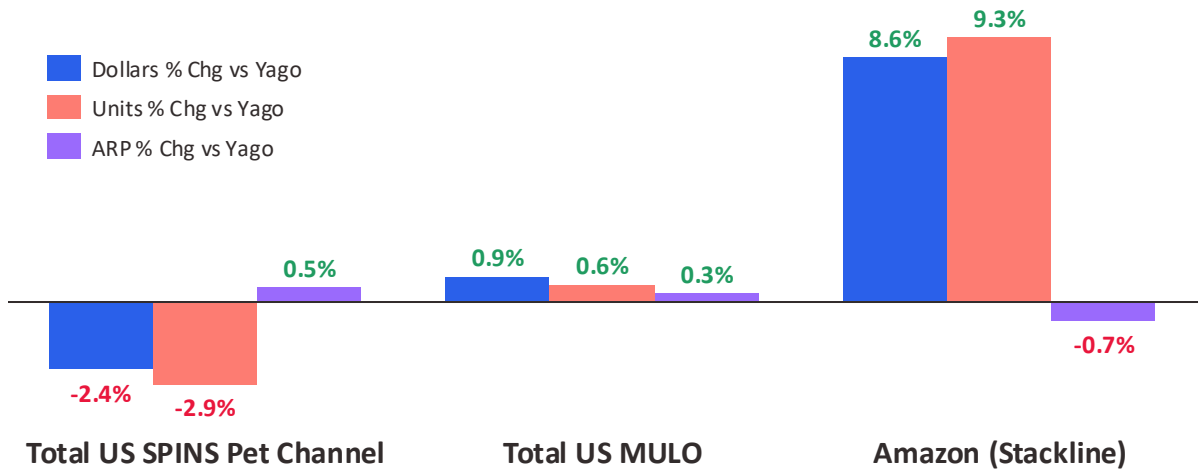


Pet Growth Is Shifting Across the Retail Landscape

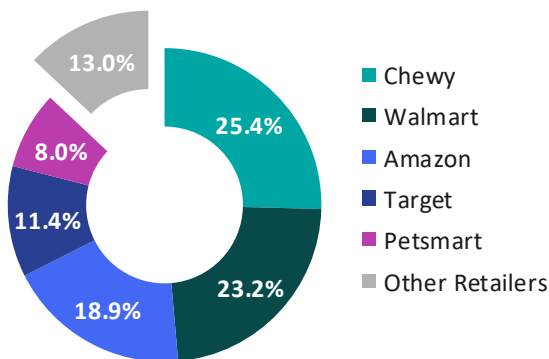


Total Pet Market

Dollars, Units, ARP % Chg, 52 Weeks Ending 7/12/26



Which Retailers Shoppers Choose the Most by Share of Purchase Intent Clicks



Chewy and Walmart are nearly tied for the largest share of shopper traffic. Together, they capture almost half of all clicks. However, independent retailers capture 13% of shopper traffic, more than PetSmart or Target alone. Shoppers value both pet-specialist assortment/expertise and the convenience of mass retail purchasing.

Source: MikMak Shopping Index, Pet Categories
Data from 7/17/25-7/17/26, US Only

Source: SPINS Pet Channel + Multi-Outlet (MULO) (Powered by Circana) + SPINS Amazon (Powered by Stackline)
Dept: Pet, All Categories, 52 Weeks Ending 7/12/26

Brick & Mortar Continues To Outperform On Basket Growth While Maintaining Share Strength In Pet Toys, Collars & Apparel.

Pet Parents Adding Extra Items To Their Baskets Each Trip

More pet items overall are being added to baskets each time pet parents shop for pet products in grocery stores, while extra treats are added when shoppers visit pet stores.

% of Units Per TRIP Vs Year Ago.

Pet		Grocery/MULO		Online	
0.0%	Dry Food	+0.4%	Dry Food	0.0%	Dry Food
-5.6%	Wet Food	+4.6%	Wet Food	+2.0%	Wet Food
+0.1%	Treats	+0.8%	Treats	0.0%	Treats
-3.0%	NON-Food	+5.9%	NON-Food	-3.4%	NON-Food

Circana Panel Data: Number of Items Per Trip Vs YAGO 52 Weeks ending 7/12/26
(Non-Food* Apparel, Toys, Waste Management, Habitats & Bedding)

Share Of Pet Category Sales By Retail Channel

(% Represents \$ Share Of Total Market)

Category	SPINS Pet Channel	MULO	Amazon
Pet Toys/Collars/Apparel	21%	66%	13%
Dog Food	13%	69%	17%
Dog Treats	8%	64%	28%
Pet Food	6%	55%	39%
Pet Habitat & Travel	6%	28%	65%
Cat Food	5%	77%	18%
Pet Care & Wellness	5%	18%	77%
Cat Treats	3%	76%	21%
Pet Waste Management	3%	69%	28%

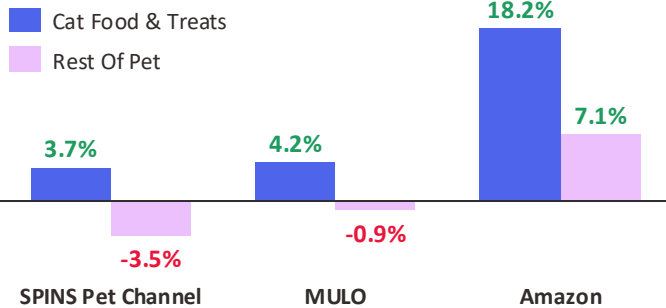
Source: SPINS Pet Channel + Multi-Outlet (MULO) (Powered by Circana) + SPINS Amazon (Powered by Stackline)
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Year Of The Cat: Pet Sales Shift Towards Specialty & Natural Cat Consumables

In 2025, Cat ownership rose to 39% of U.S. households, driven by Gen Z and Millennials*

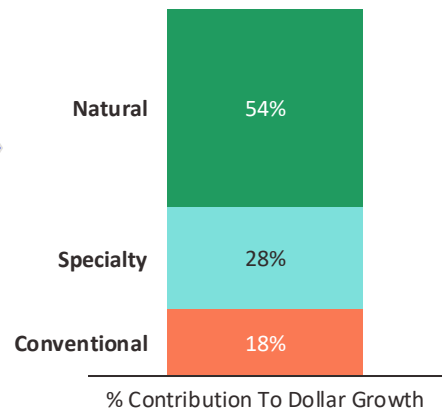
Cat Food & Treats Drive Growth Across All Channels

Cat Food & Treats Performance 52 Weeks Ending 7/12/26



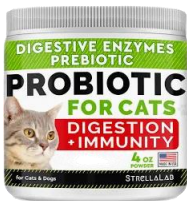
In the Pet Channel, **Natural & Specialty Cat Food & Treats** Contributed **82%** Of Dollar Growth

SPINS Pet Channel Cat Food & Treats



Cat Food & Treats Products Are Setting The Pace

Key product attributes are outperforming dog products.



Probiotic Supplement
Functional Ingredients

+120.1%



**Liquid / Paste
Form**

+108.2%



Cat Treat – Lickables
Product Type

+101.1%

* The Pet Industry in 2026: Key Trends for Business Growth | American Pet Products Association
Source: SPINS Pet Channel + Multi-Outlet (MULO) (Powered by Circana) + SPINS Amazon (Powered by Stackline)
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