

Canada's Pet Market Unleashed

Key Insights & Getting to Know Pet Owners



PETS



PET FAMILIES



PET INDUSTRY



Animal Population
& Demographics

Getting to Know
Pet Owners

Key
Insights



 Supporting pet businesses and
the advancement of animal care since 1988 

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Supporting pet businesses and the advancement of animal care since 1988



GST is not an ingredient we need in our pet food

Ask the Federal Government to remove GST from pet food

Pets Canada Member Tariff Webinar

What You Need to Know About
Tariffs and the Pet Sector



May 5th | English Presentation
 May 6th | French Presentation



No pack member left behind

Include pets in emergency evacuation strategies







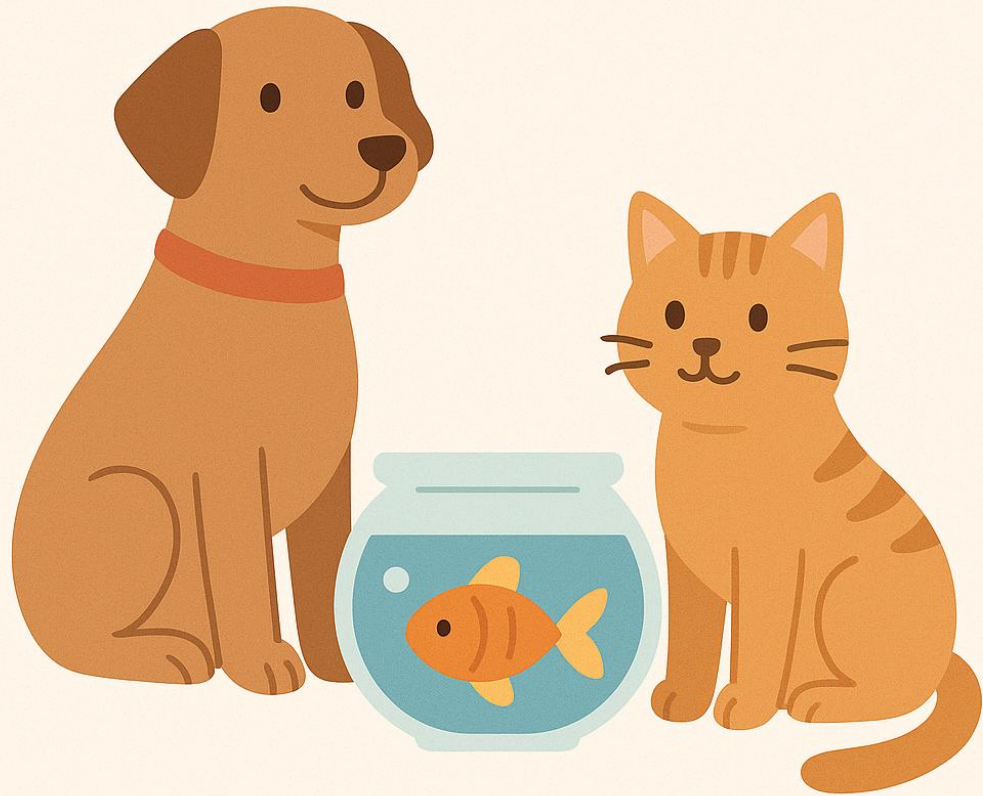
International Trade Events

Bringing Canadian pet products to the world.

Be part of the international team through the Canadian Pavilion Program or join us on a mission to discover foreign markets.



PETS



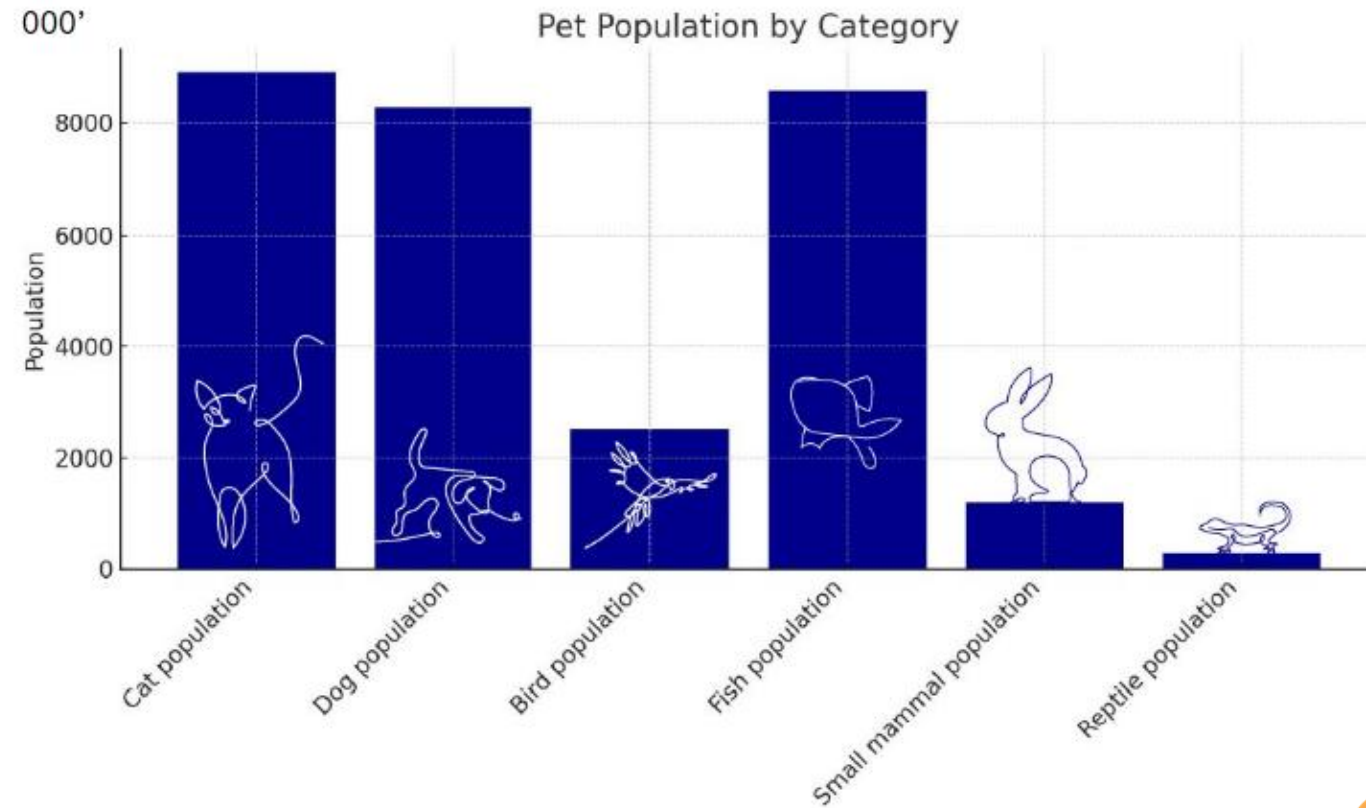
Animal Population & Demographics



Canadian Pet Pop.

Source: Euromonitor International, 2024

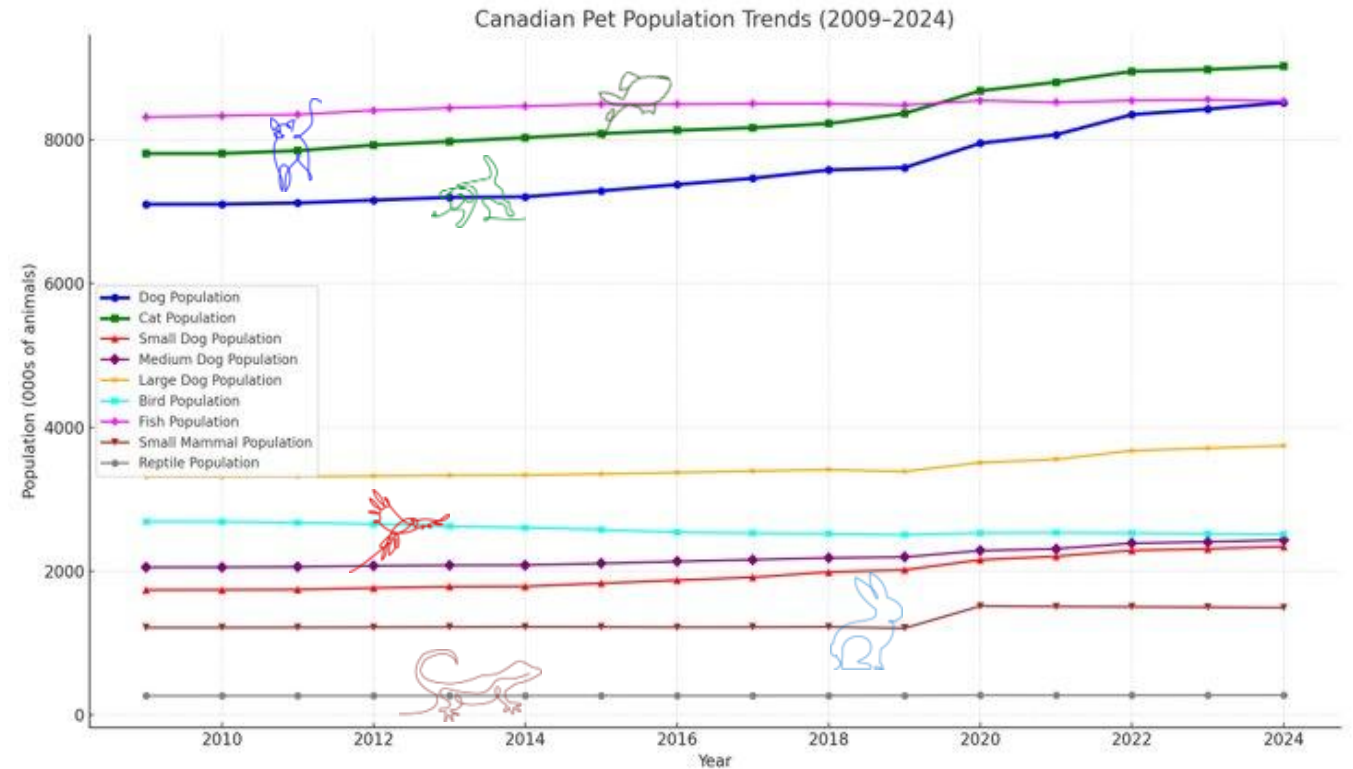
Total pet populations in 2024 –
29,758,400





Pet Population in Canada and trends

Source: Euromonitor International, 2024



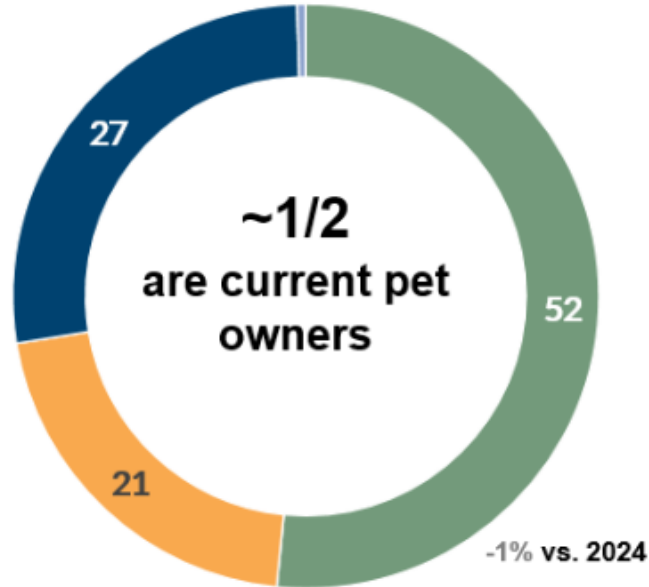
Consistent with last year, half of households continue to report having a pet in their home



Total panel

Ownership (%)

Base: n = 5,588



- We currently have a pet(s) in our household
- We do not currently have a pet(s) in our household, but have in the past
- We do not currently have a pet(s) in our household and never have
- Prefer not to answer

Source: Pets Canada Survey on Canada Homescan Panel (July 2025)

Q3. Which of the following best describes your household at this time? Please select one.

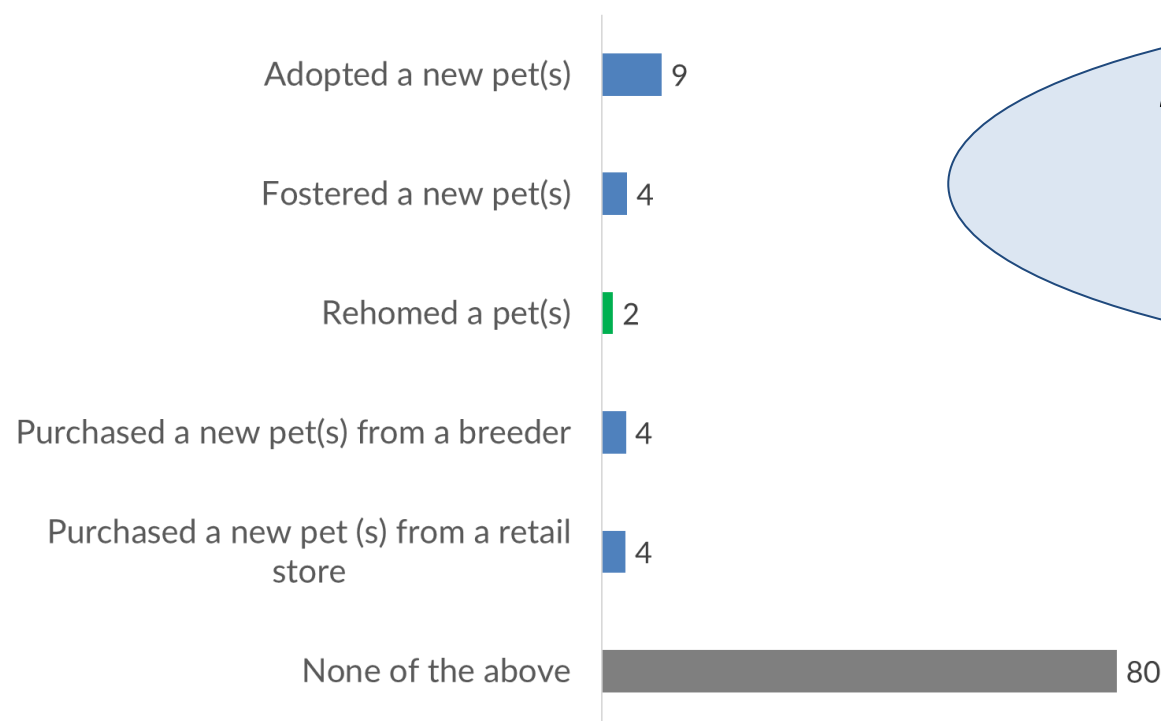
PREFERRED RESEARCH PARTNER OF
Pets Canada  **Animaux**
de compagnie Canada

NIQ

While 20% engage in pet-related activities in the past year, cats and dogs made up the majority of rehomed pets

Pet-related activities in P12M (%)

Base: n = 2,786



*Personal changes are the top reason for pet rehoming, followed by behavioral and financial concerns**

Source: Pets Canada Survey on Canada Homescan Panel (July 2025)

Q8A. Thinking about your household, which of the following have you done in the past 12 months? Please select all that apply.

Q8B. You mentioned that you have rehomed a pet(s) in the past 12 months, what type of species was rehomed? Please select all that apply.



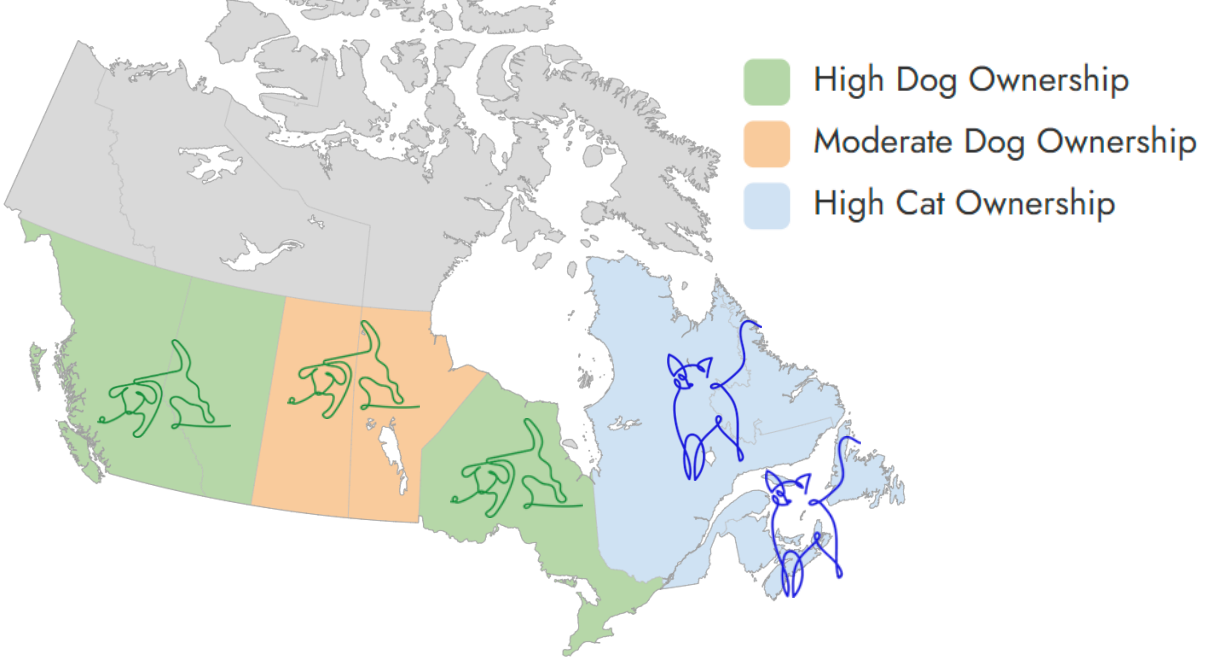
PET FAMILIES



Getting to Know Pet
Owners



Pet ownership is generally consistent across regions & income



Made with ultimaps.com

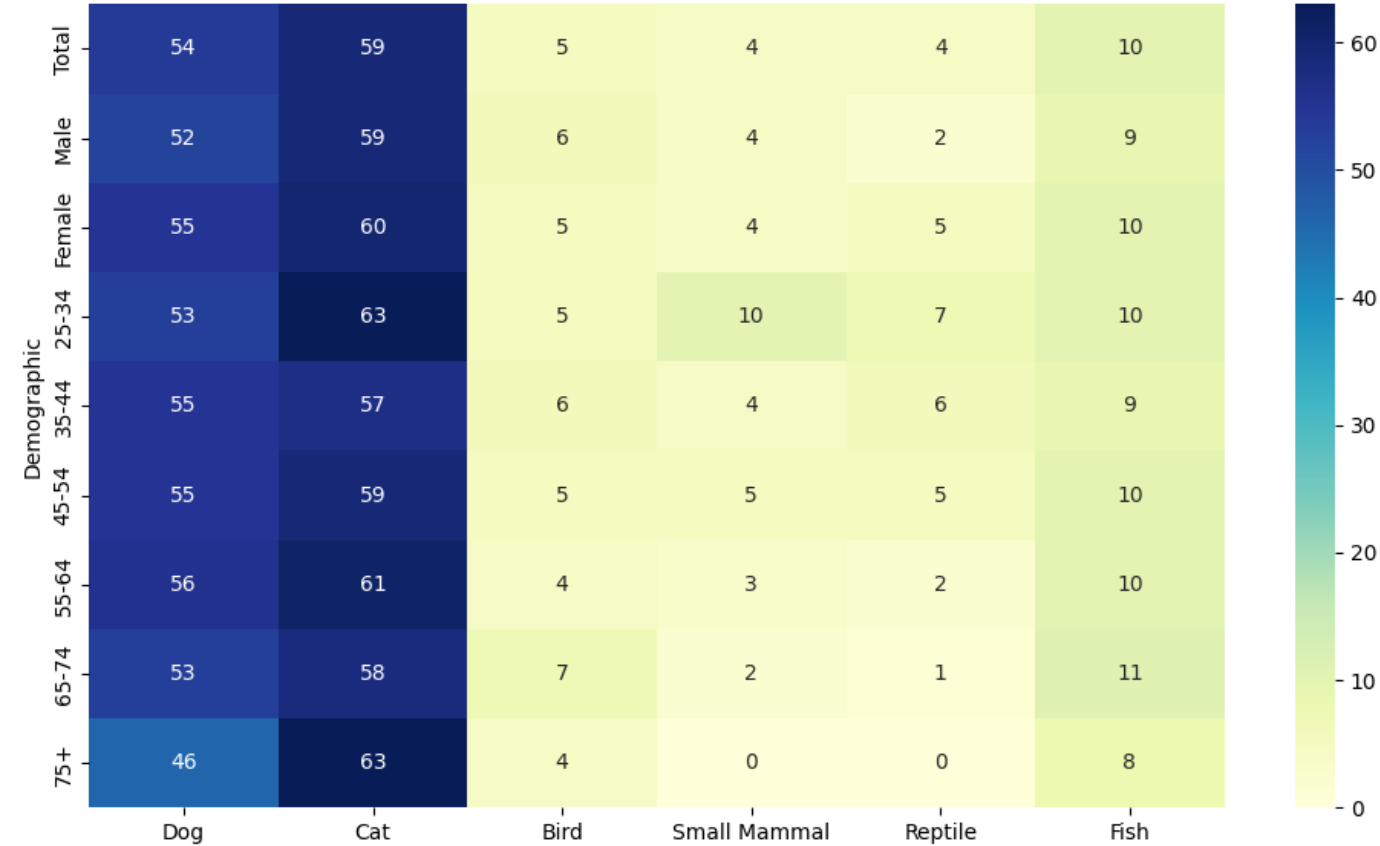
& income view

Total	Region				Income				
	Ontario	West	Quebec	Maritimes	under \$20k	\$20 to \$29k	\$30 to \$39k	\$40 to \$49k	\$50 to \$69k
5588	2230	2028	916	414	368	456	471	513	975
52%	51%	51%	51%	63%	47%	45%	49%	49%	50%

NOTE: Over/Under indexed group
Indexed to Total



Pet Ownership Percentages Across Demographics



Younger households
still show stronger
pet ownership trends

Age/Gender view (at least one pet)

	vs.2024	Total	Gender		Age					
			Male	Female	25-34 yo	35-44 yo	45-54 yo	55-64 yo	65-74 yo	75+ yo
(n=)		2786	611	2169	123	413	603	835	642	163
Dog	-2%	54%	52%	55%	53%	55%	55%	56%	53%	46%
Cat	-1%	59%	59%	60%	63%	57%	59%	61%	58%	63%
Bird	+1%	5%	6%	5%	6%	5%	5%	4%	7%	4%
Small mammal	+1%	4%	4%	4%	10%	4%	5%	3%	2%	0%
Reptile	=	4%	2%	5%	7%	6%	5%	2%	1%	1%
Fish	=	10%	9%	10%	10%	13%	12%	7%	6%	5%

NOTE: Over/Under indexed groups >120/<80 Indexed to Total Respondents

NOTE: * Low sample groups (Non-binary & 18-24 yo) have been omitted

Source: Pets Canada Survey on Canada Homescan Panel (July 2025)

Q4. How many of the following types of pet(s) do you currently have in your household? If you do not own a certain species, select 0.

Pet Ownership Percentages by Life Stage

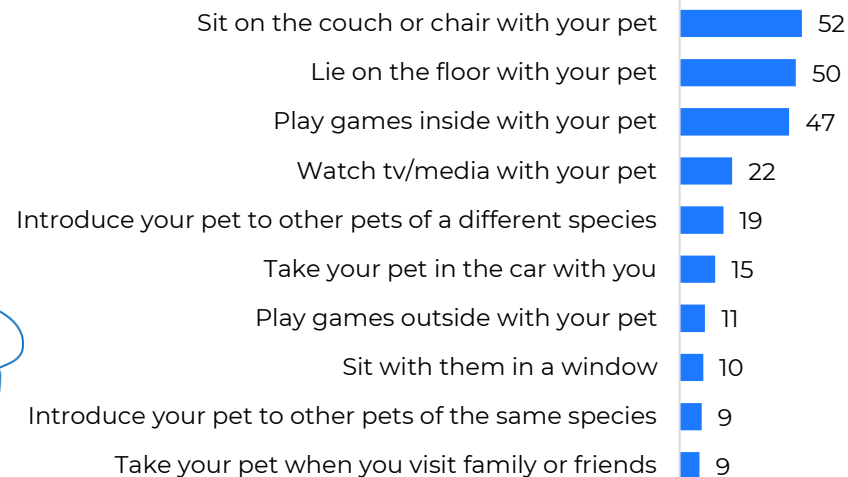
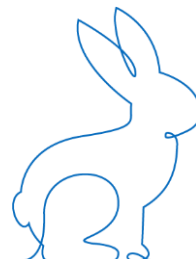
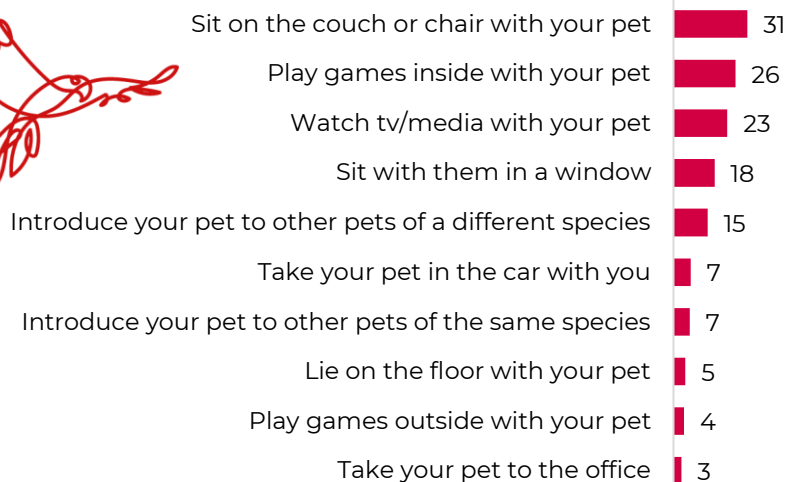
	Dog	Cat	Bird	Small Mammal	Reptile	Fish
Start Up Families	65	49	0	2	1	6
Small Scale Families	48	65	6	3	2	8
Younger Bustling Families	62	56	9	4	3	9
Older Bustling Families	60	56	8	3	2	10
Young Transitionals	46	70	8	6	4	7
Independent Singles	47	64	4	2	1	6
Senior Singles	41	66	5	1	0	5
Established Couples	57	56	5	2	1	7
Empty Nest Couples	50	57	5	2	1	8
Senior Couples	56	57	5	1	0	6

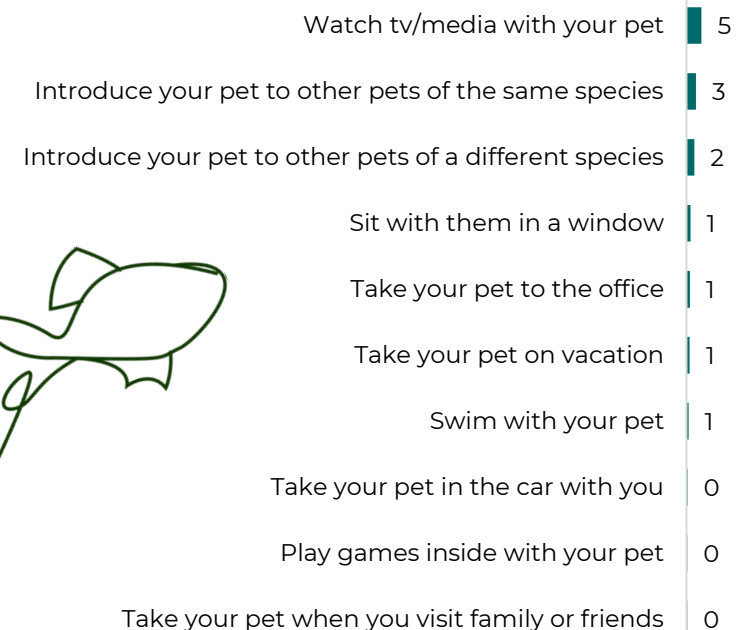
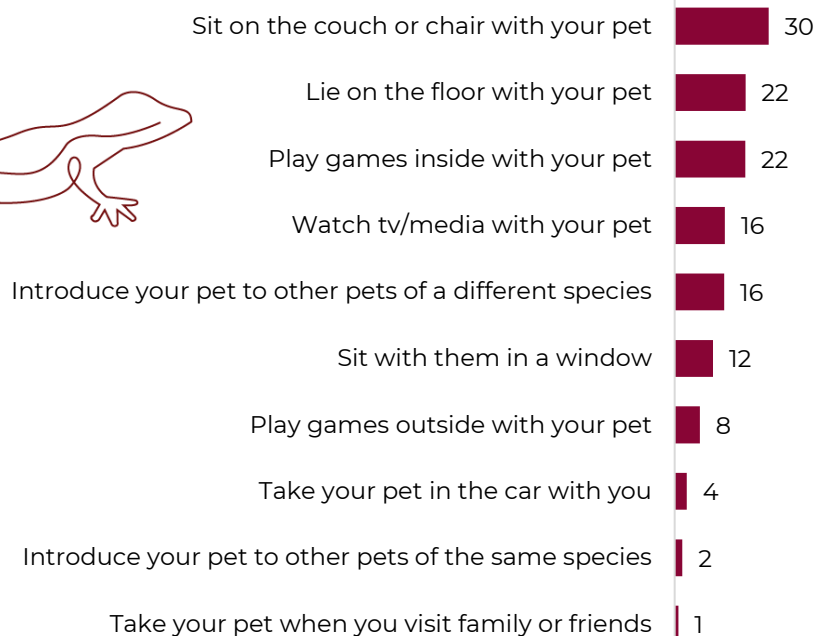
Dog & specialty pet species ownership are more likely in bustling families; Start-up families like raising dogs, reptile and fish

Source: Pets Canada Survey on Canada Homescan Panel delivered by NielsenIQ (July 2025)



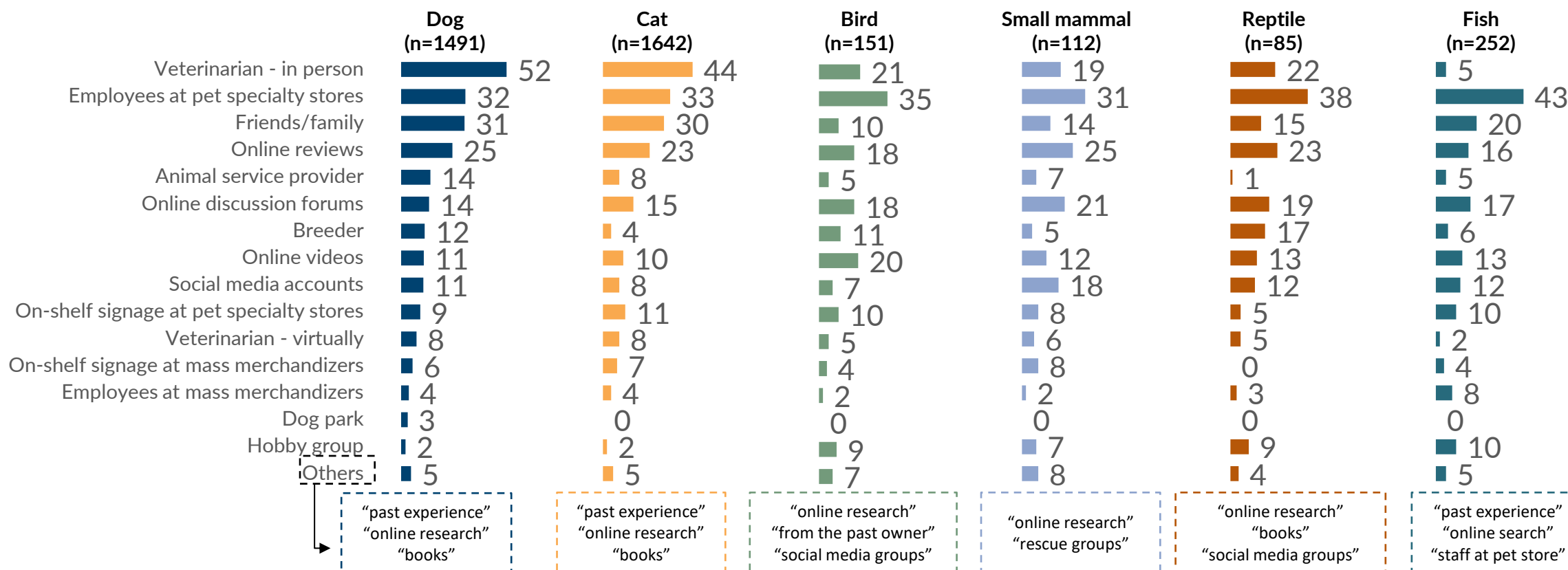
Getting to Know Pet Owners – Pet Interactions





Most pet owners rely on professionals and store staff for information, but those with niche species are more likely to seek advice from online communities

Product Information Sources (%)



Source: Pets Canada Survey on Canada Homescan Panel (July 2025)

Q19. When seeking out products for your pet(s), what sources do you go to for awareness/guidance? Please select per species of pet in your home.

Please select all that apply. | BASE: Total respondents (n=2786)



Pet Family Challenges

- Nearly 1 in 4 households feel negatively about their household finances
- 83% of Canadian pet owning households are looking to reduce pet expenses.
- In the past year, nearly 40% of pet owners feel they have spent more on their pets



Steps taken to reduce expenses (%)



Dog (n=1491)	Cat (n=1642)	Bird (n=151)	Small mammal (n=112)	Reptile (n=85)	Fish (n=252)
38%	42%	36%	40%	49%	37%
29%	32%	29%	44%	34%	31%
27%	26%	26%	20%	25%	26%
21%	21%	21%	29%	19%	24%
15%	19%	23%	17%	25%	18%
16%	17%	14%	18%	13%	17%
15%	15%	19%	19%	15%	16%
15%	14%	18%	16%	16%	20%
15%	10%	19%	14%	22%	15%
12%	12%	17%	18%	12%	14%
10%	10%	4%	11%	8%	10%
10%	5%	5%	6%	5%	8%
5%	5%	4%	11%	5%	11%
6%	5%	1%	5%	3%	8%
19%	17%	21%	9%	15%	18%

NOTE: Over/Under indexed groups >120/<80

Indexed to Total Respondents

Source: Pets Canada Survey on Canada Homescan Panel (July 2025)

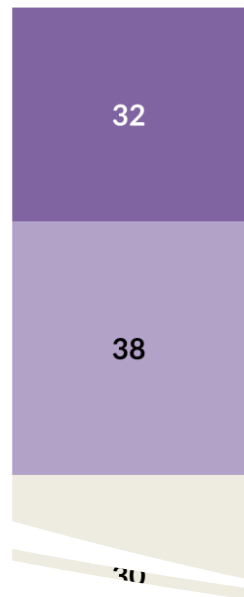
Q23c. Which of the following activities, if any, have you/your household been doing to reduce your households expenses related to your pet(s)? Please select all that apply. | BASE: Total respondents (n=2786)



Choose Canadian-made pet food (%)

Top 2 boxes

70%



■ Much more important - I now buy only Canadian-made pet food

■ Somewhat more important - I now consider Canadian-made more often than before

■ About the same - No real change in my consideration of Canadian-made products

Choose Canadian-made pet non-food (%)

Top 2 boxes

70%



■ Much more important - I now buy only Canadian-made pet food

■ Somewhat more important - I now consider Canadian-made more often than before

■ About the same - No real change in my consideration of Canadian-made products

Buying Canadian-made pet products matters to Canadian consumers



PET INDUSTRY

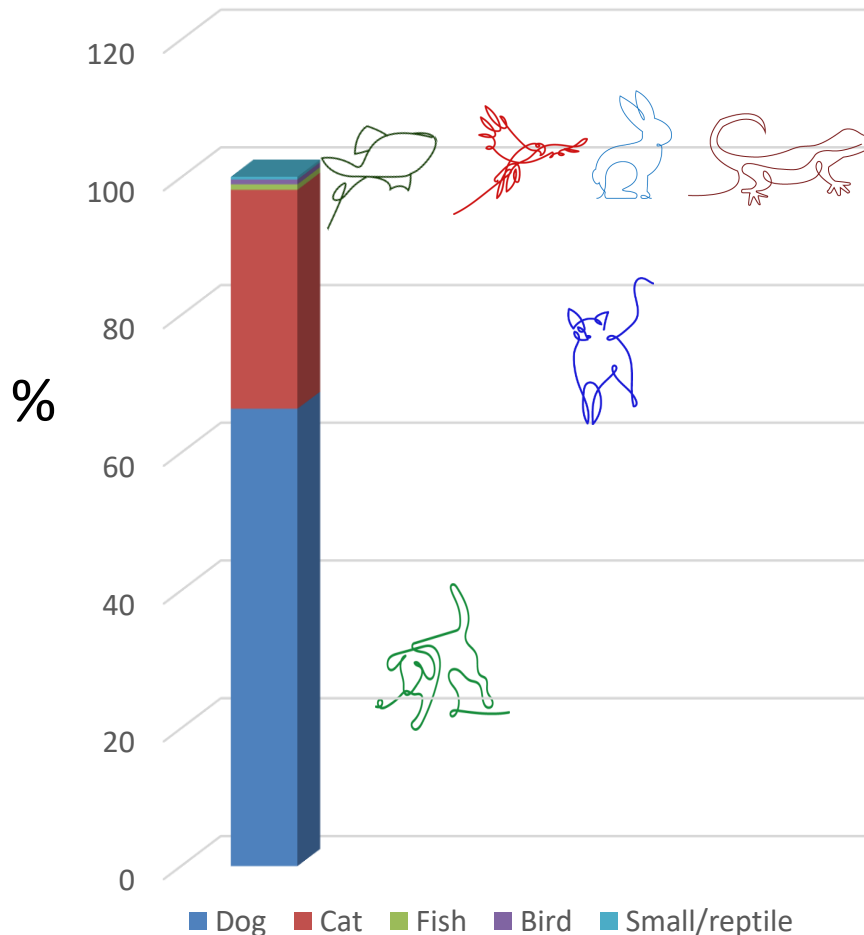


Key Insights

Pet Food Sales 🍁

Total pet food sales: C\$6.7 billion

- Cat food (C\$2.1B)
- Dog food (C\$4.5B)
- Bird food (C\$44.7M)
- Fish food (C\$53.5M)
- Small mammal/reptile food (C\$23.8M)



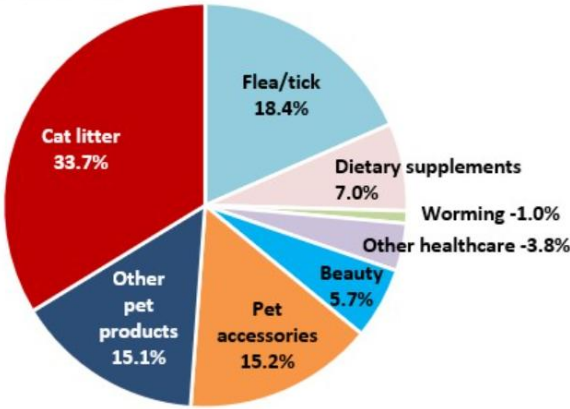
Non-Consumables

Pet healthcare and other beauty products - retail sales value in Canada by category, 2024 using current prices, Can\$ millions

Retail sales growth of pet products in Canada by sub-category, forecast

Total healthcare & other pet product sales: C\$2.6 billion

- Flea/tick treatment (C\$470.5M)
- Pet dietary supplements (C\$180.5M)
- Worming treatment (C\$25.6M)
- Other pet healthcare (C\$98.1M)
- Beauty products (C\$147.4M)
- Pet accessories (C\$390.6M)
- Other pet products (C\$387.5M)
- Cat litter (C\$863.5M)



Category	Annual growth % 2025/2024	CAGR* % 2024-2029	Total growth % 2024-2029
Total - pet products	5.6	6.4	36.6
Cat litter	3.7	3.9	21.3
Pet healthcare	8.4	9.6	58.3
Other - beauty and accessories	5.0	5.8	32.6

Source: Euromonitor International, 2024

*CAGR: Compound Annual Growth

Christine Carrière

christine.carriere@petscanada.org

President & CEO Pets Canada

<https://www.linkedin.com/company/pets-canada/>



Canada's 2025 Pet Market Unleashed

NIQ Canada + PETS Canada Market Update

Francis Parisien
SVP SMB Sales Canada & Strategic Initiatives

Sept. 10, 2025





25%

of Canadians say
their household
finances will
worsen by the
end of 2025

23%
Global

30%

of Canadians say
their household
finances will
improve by the
end of 2025

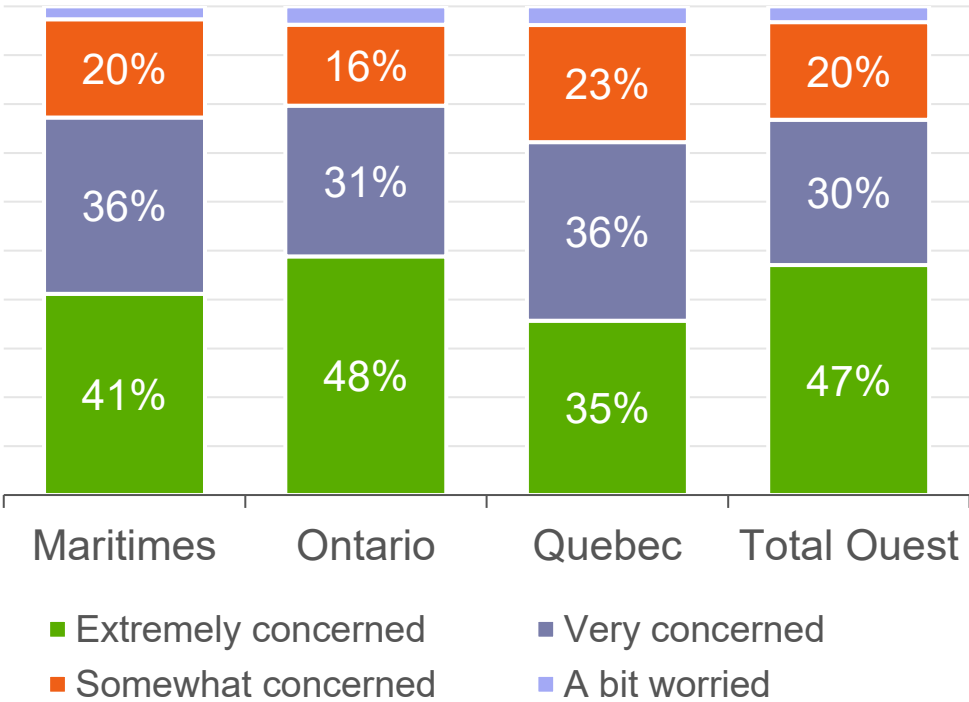
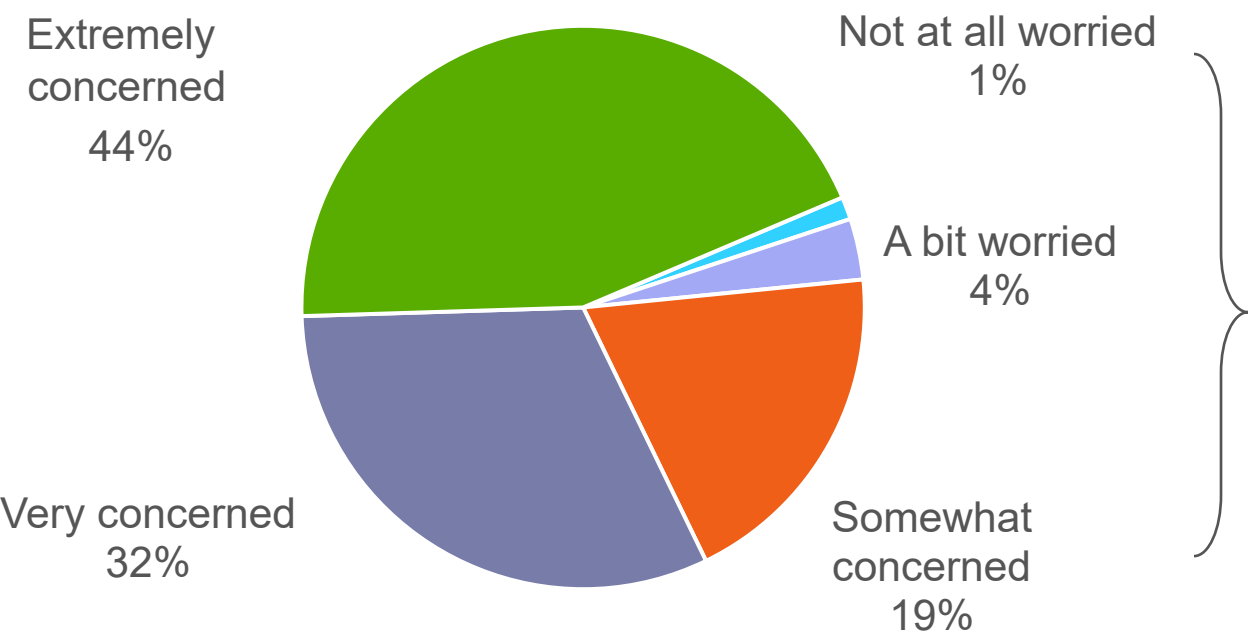
46%
Global

Source: Étude NIQ, Finding Harmony on the Shelf – Outlook on Private Label and Branded Products, May 2025

Canadian consumers remain (really) concerned about possible price increases

Quebecers are the least concerned about such an increase over the next 12 months

Concerns about a possible rise in food prices over the next 12 months
Canada



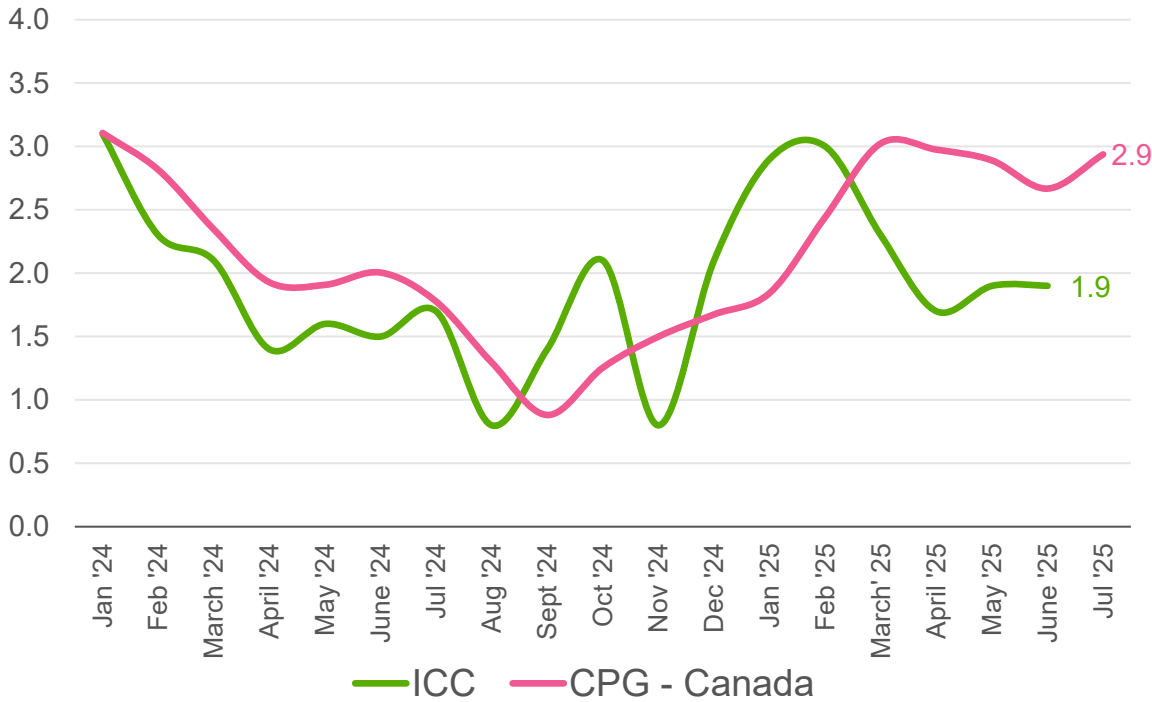
Source: NIQ Canada, Home Meal Replacement Study, May 2025

GIC inflation is on the rise for categories measured by NIQ in Canada

NIQ inflation is higher than the rates announced by Statistics Canada, which are lower because of gaz prices

CPI vs. GIC inflation measured by NIQ

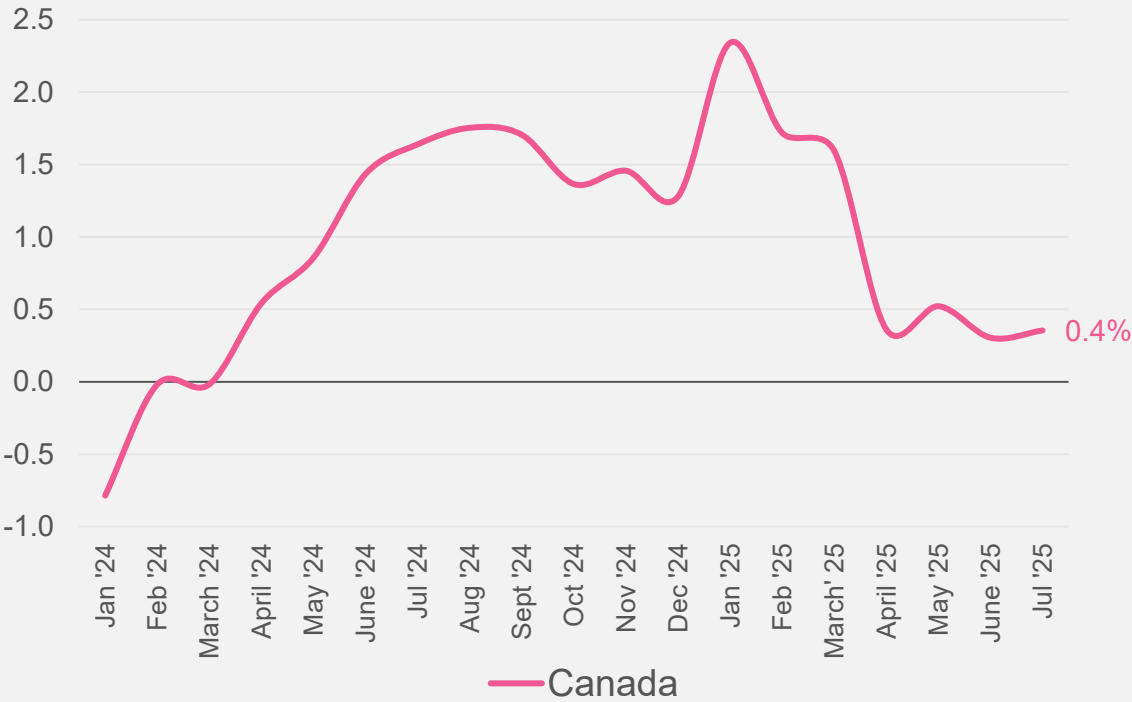
NIQ Inflation = % chg vol. \$ – % chg vol. tonn., 12 wk periods



Unit sales are stable in Canada, with little growth for the whole of CPG categories

Unit sales growth

Chg % vol. units, 12 wk periods



Source: Statistics Canada, NIQ MarketTrack, All Networks, 12-Week Rolling Periods, Latest Period= July 12, 2025

How do Canadians see themselves when CPG shopping?

**Price-
driven**
51%

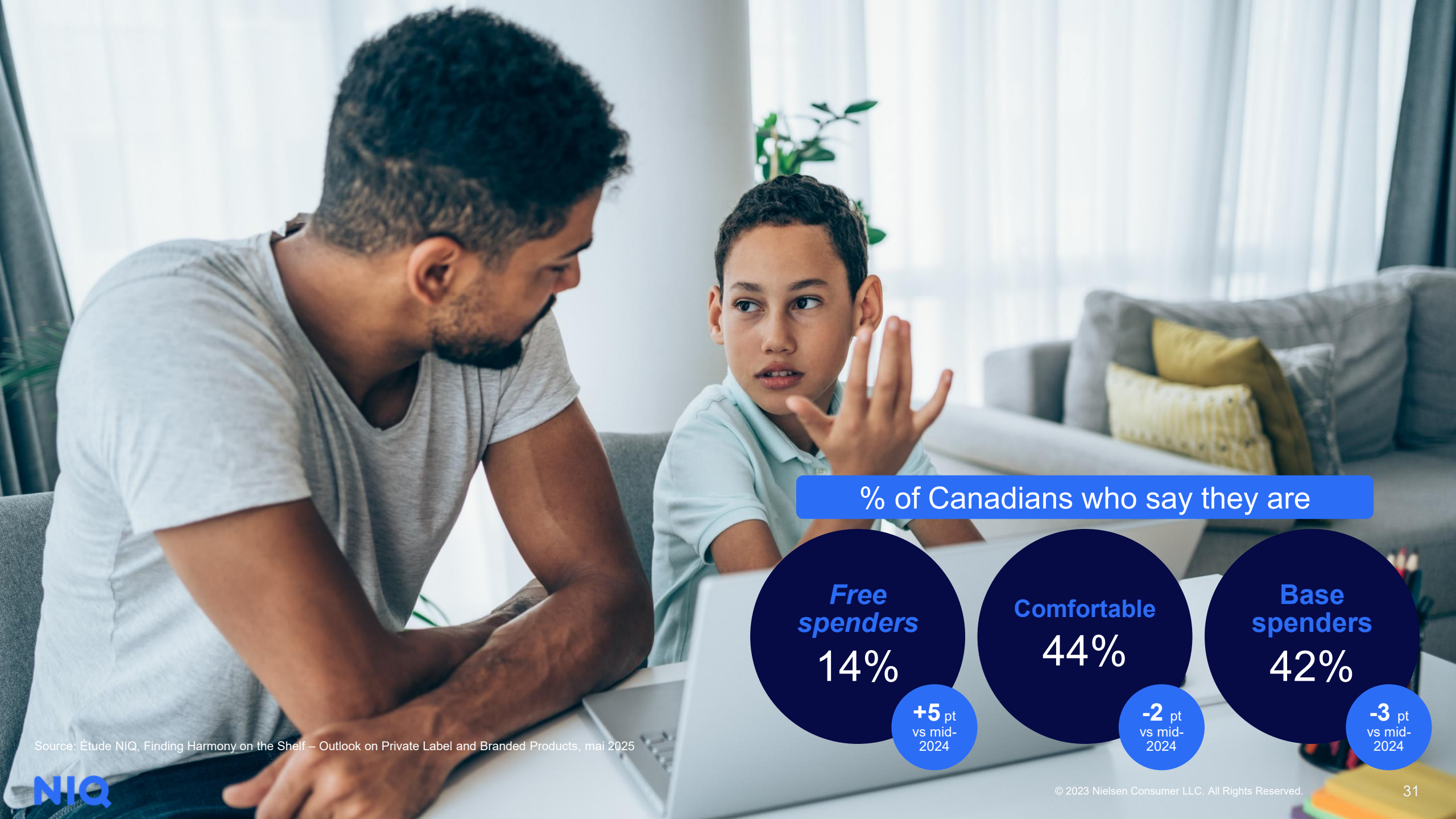
**Budget-
driven**
49%

**Quick in-
and-out**
32%

**Quality-
driven**
31%

**Values-
driven**
30%

Source: NIQ 2024 Enhancement Demographic Study, Dec. 2024



% of Canadians who say they are

*Free
spenders*
14%

Comfortable
44%

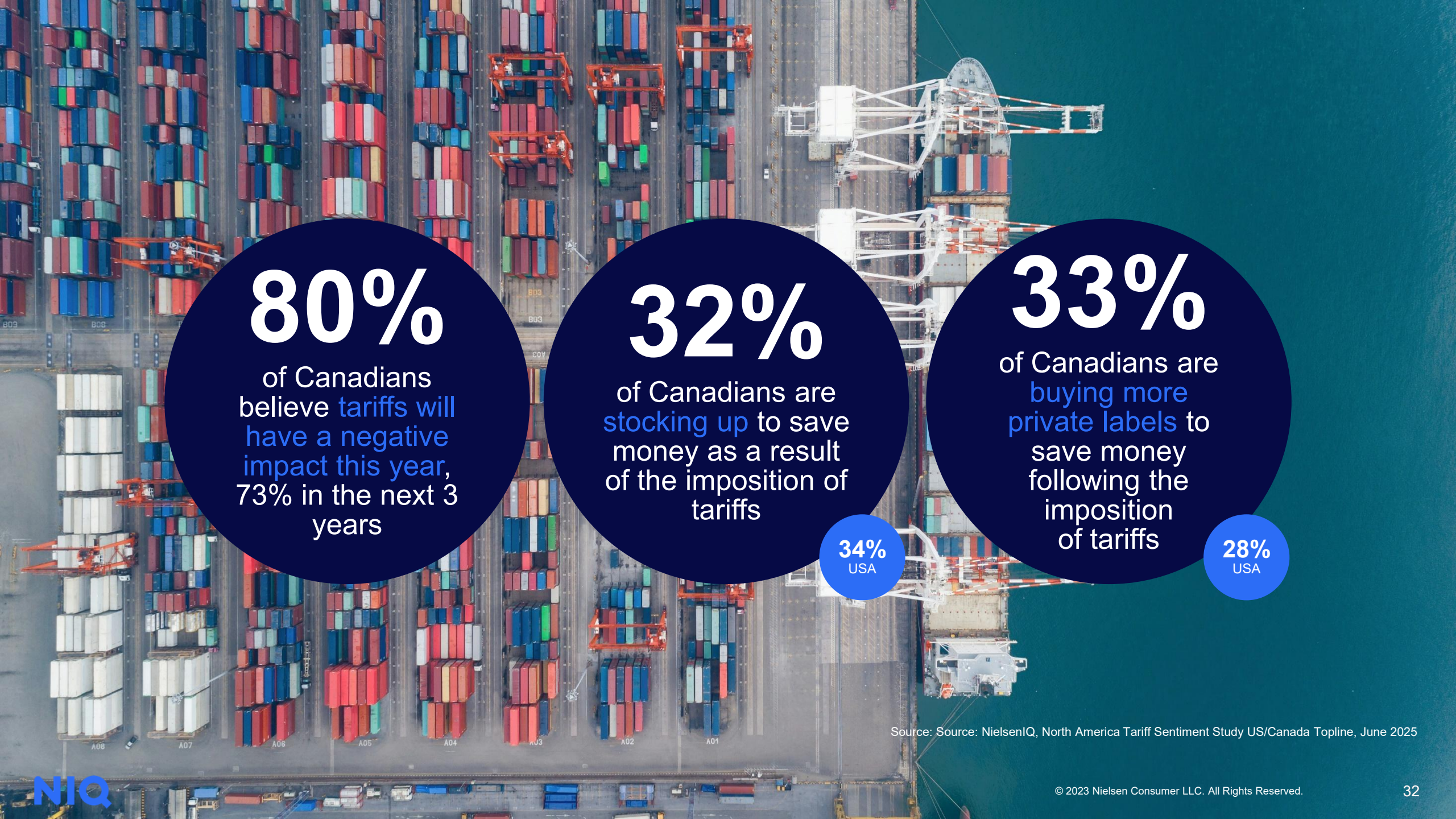
*Base
spenders*
42%

+5 pt
vs mid-
2024

-2 pt
vs mid-
2024

-3 pt
vs mid-
2024

Source: Étude NIQ, Finding Harmony on the Shelf – Outlook on Private Label and Branded Products, mai 2025



80%

of Canadians believe tariffs will have a negative impact this year, 73% in the next 3 years

32%

of Canadians are stocking up to save money as a result of the imposition of tariffs

33%

of Canadians are buying more private labels to save money following the imposition of tariffs

34%
USA

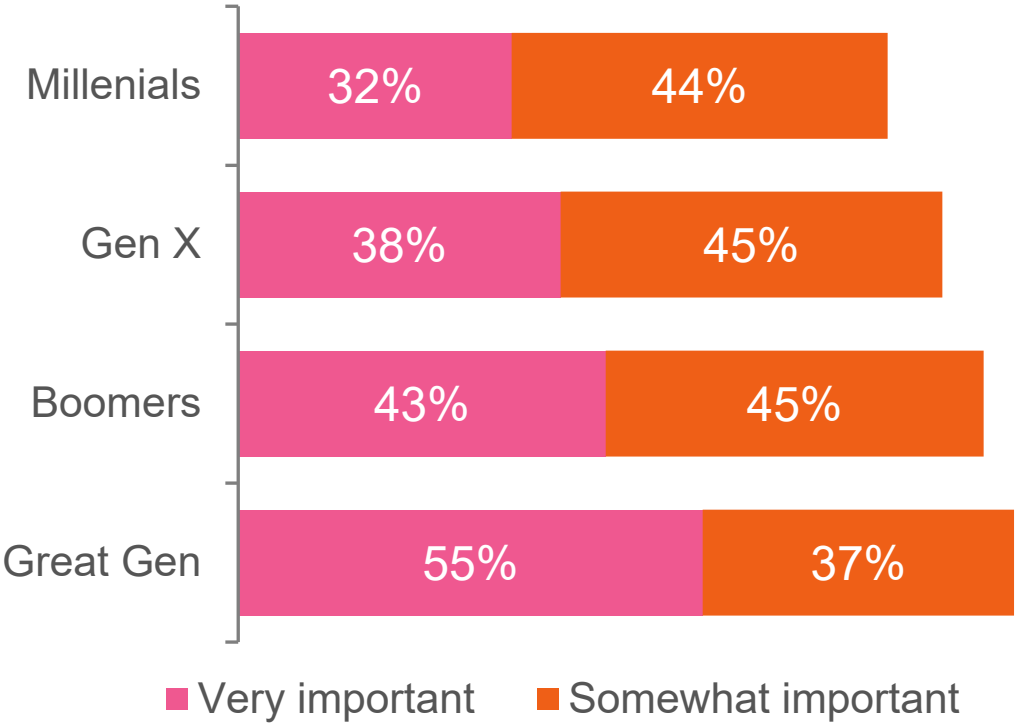
28%
USA

Source: Source: NielsenIQ, North America Tariff Sentiment Study US/Canada Topline, June 2025

The vast majority of Canadians find it important to buy local products

Younger Canadians are slightly less convinced – which sparks an opportunity for brands and retailers of the country

% who say it's important or very important to buy local Canada



Source: NielsenIQ PanelView | Food and Beverage Label Content syndicated 2025 survey

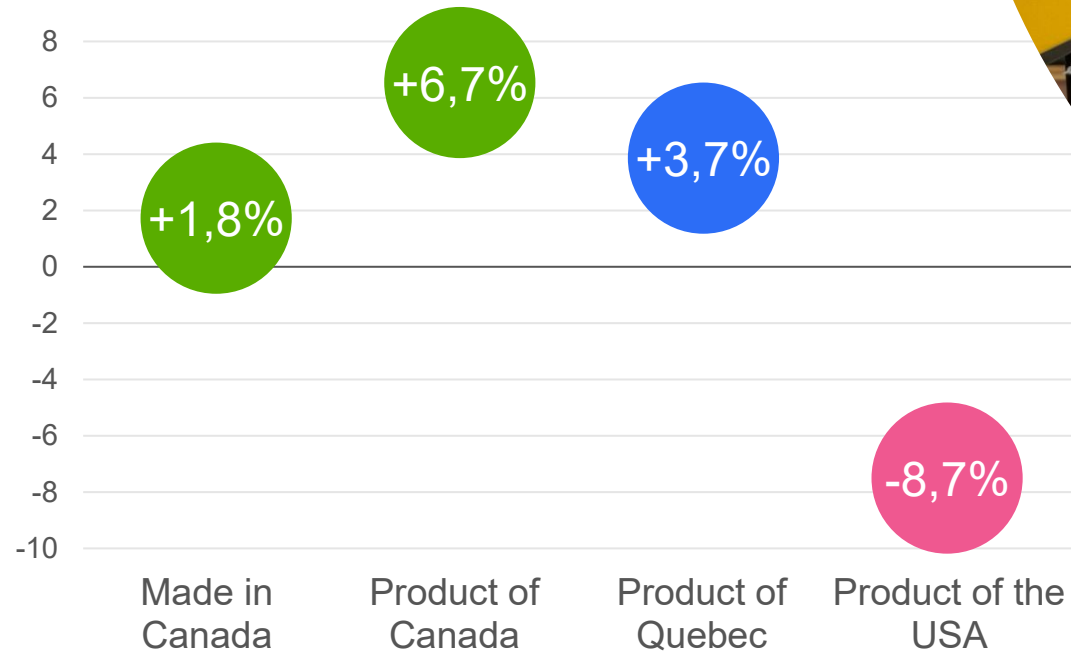


84%
of Canadians say
it's important or
very important to
buy local
products

+12 pt
vs 2024

**66% of Canadians
are extremely or
somewhat likely
to boycott brands
that are made in
the US**

**Performance by Food Product
Origin, Last 24 weeks (Quebec)**

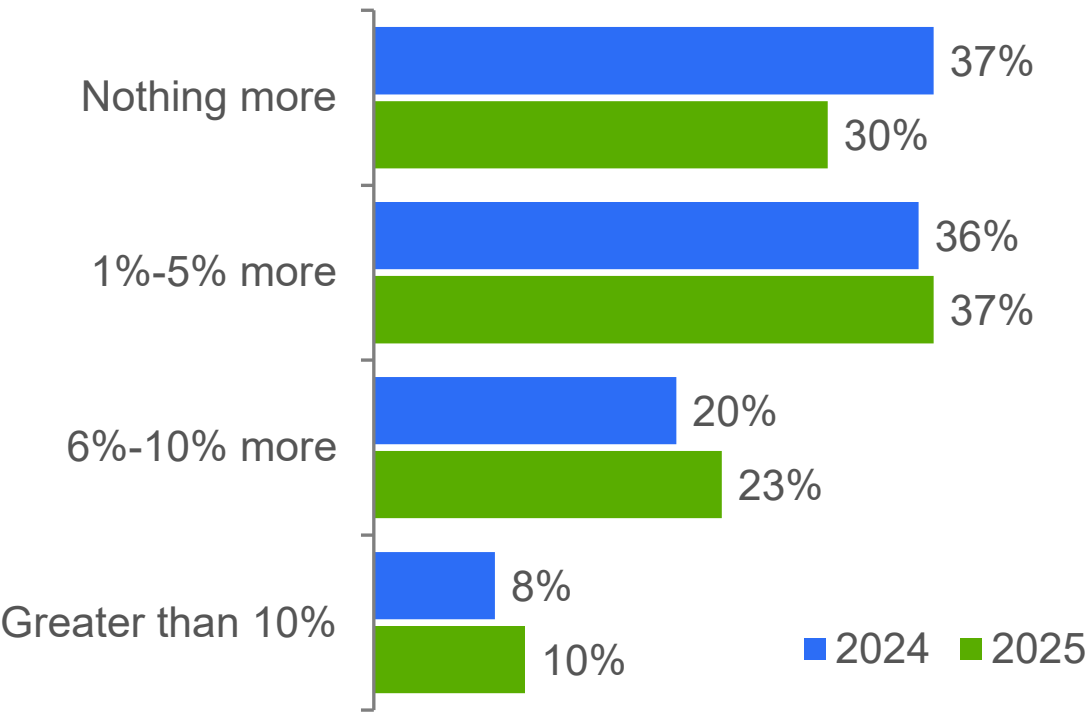


Source: NIQ NPI (NIQ MarketTrack), Quebec All Networks, 24 weeks ending August 2, 2025



Canadians are now ready to pay slightly more for Canadian products

Willingness to pay more for Canadian Products
Canada



Source: NielsenIQ PanelView | Food and Beverage Label Content syndicated 2025 survey
Image: Maple Leaf “Look for the Leaf” Campaign



30%

of Canadians say they
would be more likely
to switch stores if a
store made it easier to
find Canadian
products

Source: NIQ Canada, Syndicated Study - How Canadian Grocery Shoppers Will Respond to U.S. Tariffs, March 2025

‘Switching’ was happening before tariffs

Canadians are turning to discount options in order to save on CPG; the vast majority of discount retailers have seen their share grow in the past 2 years

Growing \$

Channel	\$ % chg
Giant Tiger	+15%
Grocery - discount	+7%
Gen Merch	+7%
Total grocery	+4%
Total on-line	+4%
Drug stores	+3%

Stable \$

Channel	\$ % chg
Total grocery	+2%
Mass Merch	+2%
Dollar stores	+1%
Warehouse clubs	0%

Declining \$

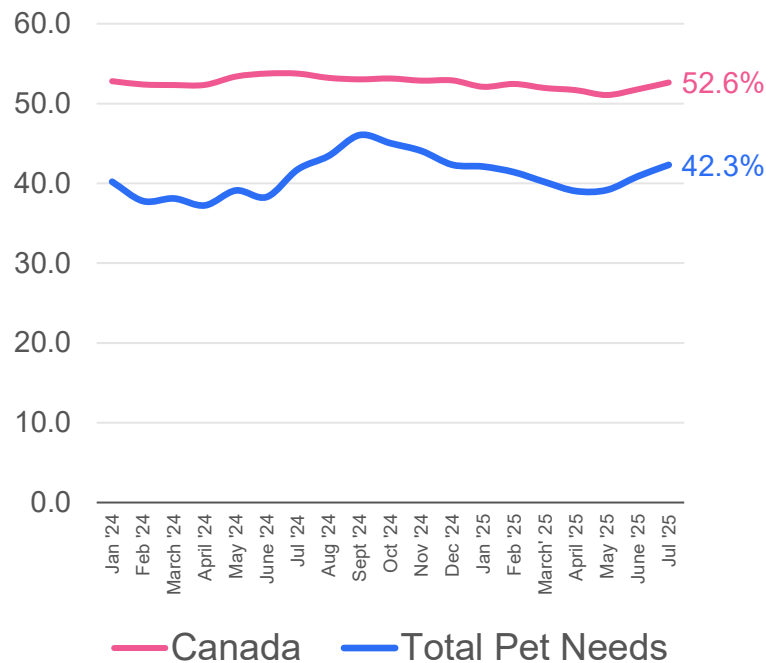
Channel	\$ % chg
Grocery – conv.	-1%
Ethnic food stores	-1%

(Source: NielsenIQ Homescan, TOTAL CPS National – Latest 12 weeks ending June 14 2025)

Canadians are looking for value – and the industry is responding

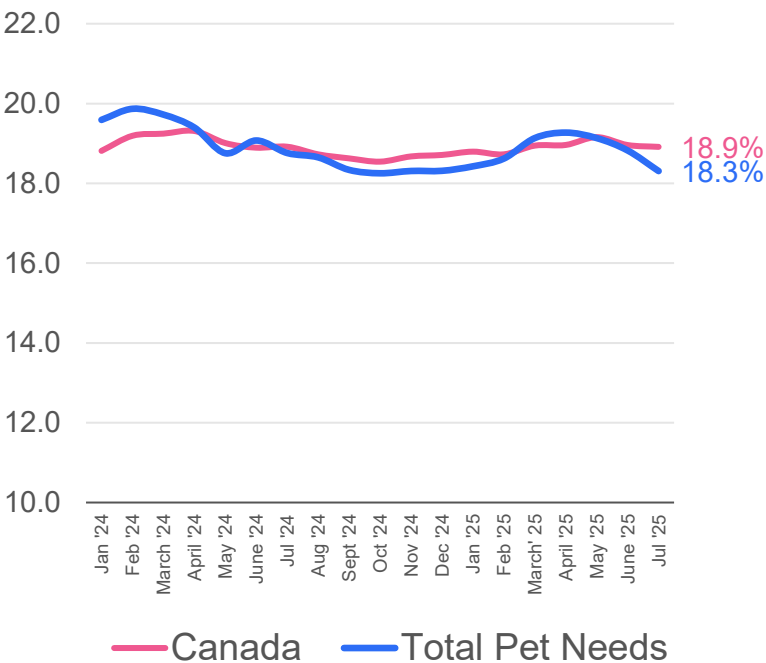
Promotions are still very important

% of units sold on promotion



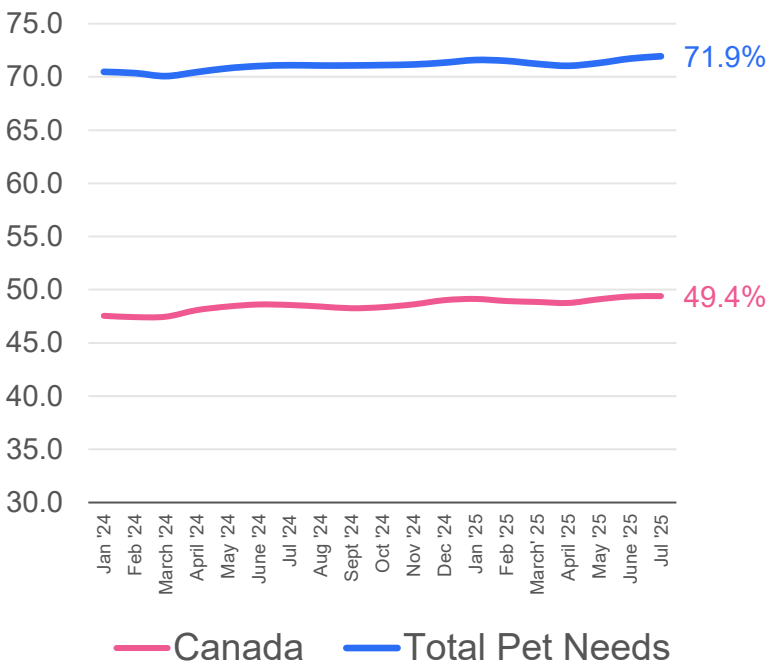
Private labels are regaining importance

Private Label Market Share (vol. \$)



Discount continues to gain market share in food

Market share (vol. \$) of discounters

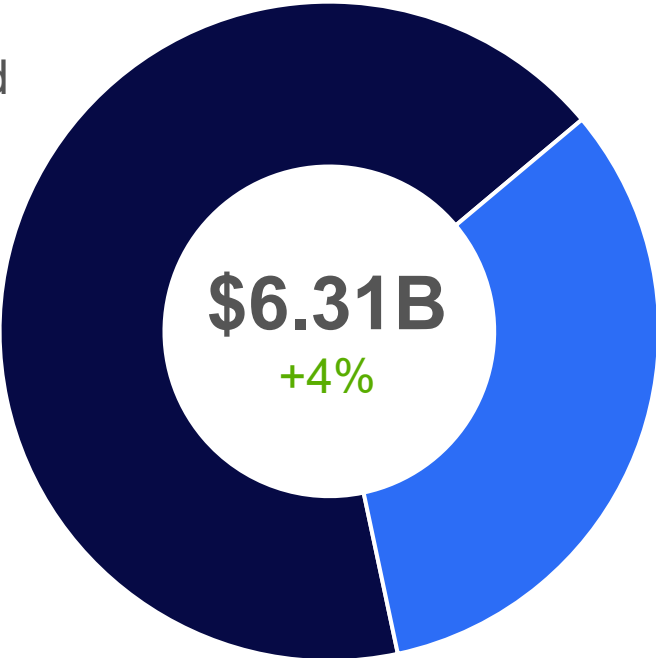


Pet categories have grown by 4% in the channels measured by NIQ's OMNI solution

Performance of total PET in all omni channels
Vol. \$, Latest 52 weeks, Canada

%

Pet Food
67.4%
+5%



\$6.31B
+4%

Pets & Pets
Care
32.9%
+3%

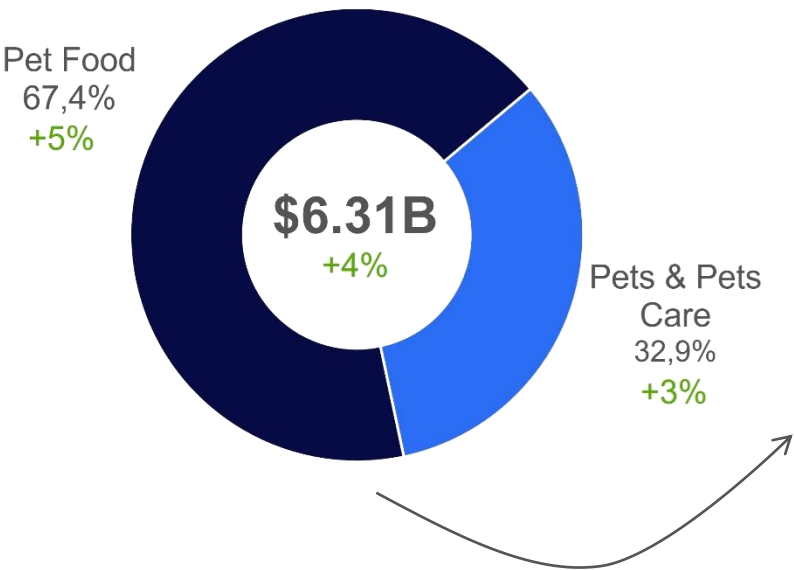


Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

Pet categories sales are growing in every market but Manitoba

Québec and BC are underdeveloped in overall pet categories sales in the country

Performance of total PET in all omni channels
Vol. \$, Latest 52 weeks, Canada



Region	Import.	% chg	Index vs ACV
Atlantic	9,0%	+0.5%	120
Quebec	18,6%	+2%	81
Ontario	40,4%	+4%	106
Manitoba	3,7%	-3%	110
Saskatchewan	3,3%	+14%	104
Alberta	13,2%	+2%	110
British Columbia	11,5%	+9%	90

Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

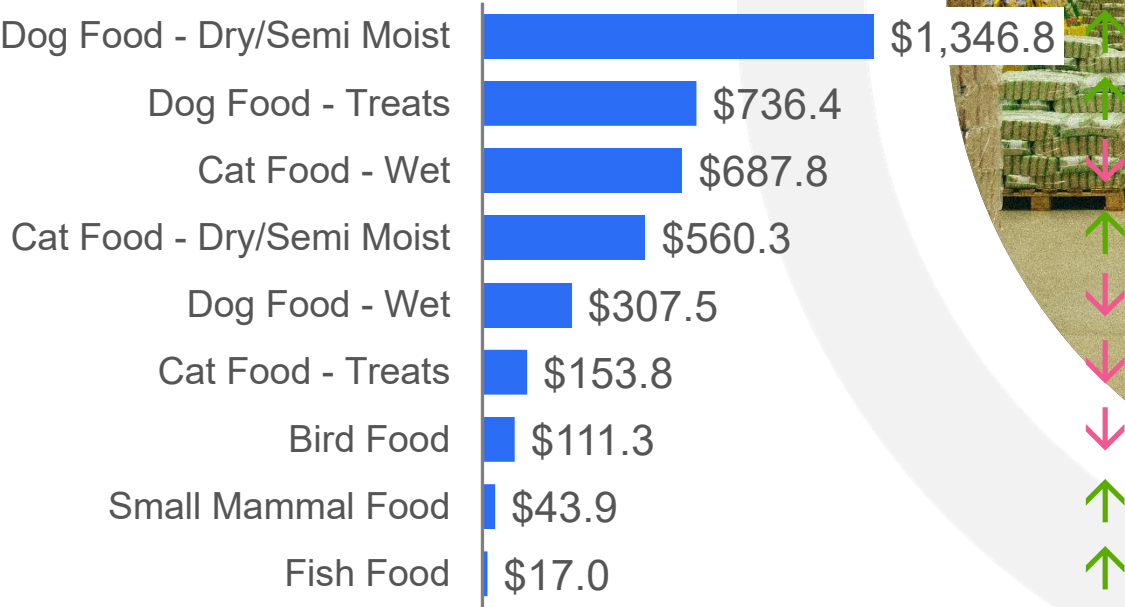
Pet food categories continue to grow as the number of pets in Canadian households remain stable

Both 'wet' categories are down vs YA in Canadian stores

Performance of Total Pet Food
Vol. \$, Latest 52 weeks, Canada

\$4.23B

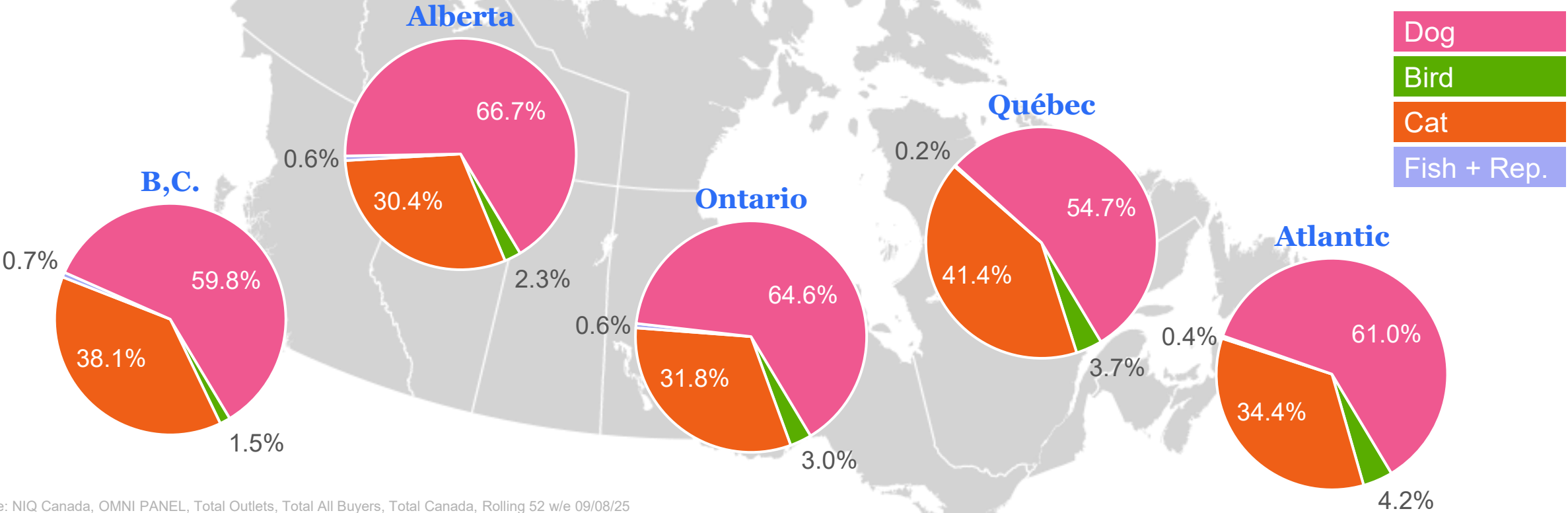
Sales (vol. \$) of
Pet Food in all
Canadian stores
measured by
NIQ's OMNI panel



Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

Québec ♥ cats, Alberta and the Western provinces prefers dogs, while more households in Atlantic Canada buy bird food – it's a real mosaic looking at Pet Food sales in Canadian stores

Importance (vol. \$) of type of Pet Food by province
Vol. \$, All Outlets (Canada)



Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

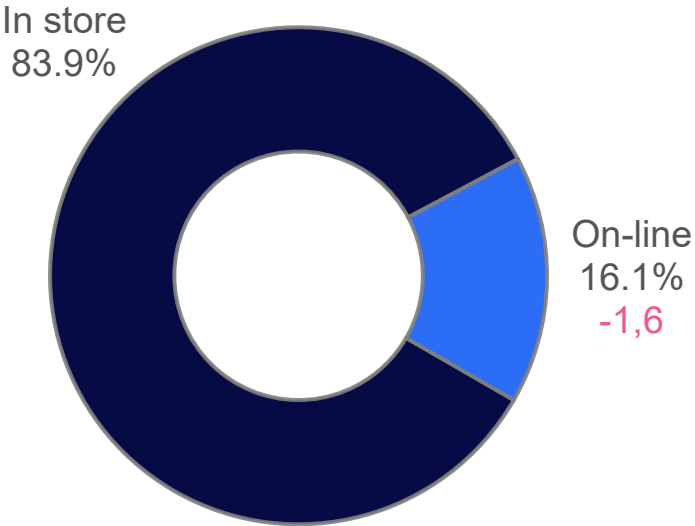
Pet Stores are the #1 destination for Pet Food categories in Canada – and they continue winning share, to the detriment of mass merch (incl. Amazon) and supermarkets

Recent store openings announcement of national Pet Store chains will only see that channel continue to grow in the country

Performance of Total Pet Food by channels
Vol. \$, Latest 52 weeks, Canada



Channel	Shr (\$)	Shr Pt Chg
Pet Stores	39,4%	3,8
Mass Merch Stores	27,5%	-3,0
Grocery Supermarkets	14,6%	-0,8
<i>Conventional Grocery</i>	7,8%	-0,6
<i>Discount Grocery</i>	6,8%	-0,2
Warehouse Club	9,2%	-0,2
Dollar Stores	4,6%	0,4
General Merchandise Stores	2,2%	-0,1
Hardware/Garden Stores	0,9%	-0,2
Food Delivery Service	0,7%	0,0
Drug Stores	0,7%	-0,1

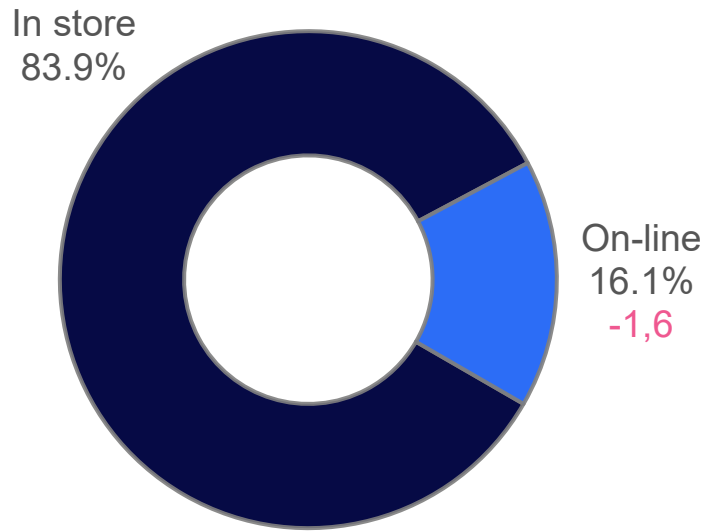


Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25, [Pet Valu Expects to Open 40-50 New Stores in 2024 - Connect CRE Canada](#), [Global Pet Foods » Fort York, ON – Now Open](#), [Mondou to move into new automated DC in Mascouche, Quebec - Inside Logisitics](#).

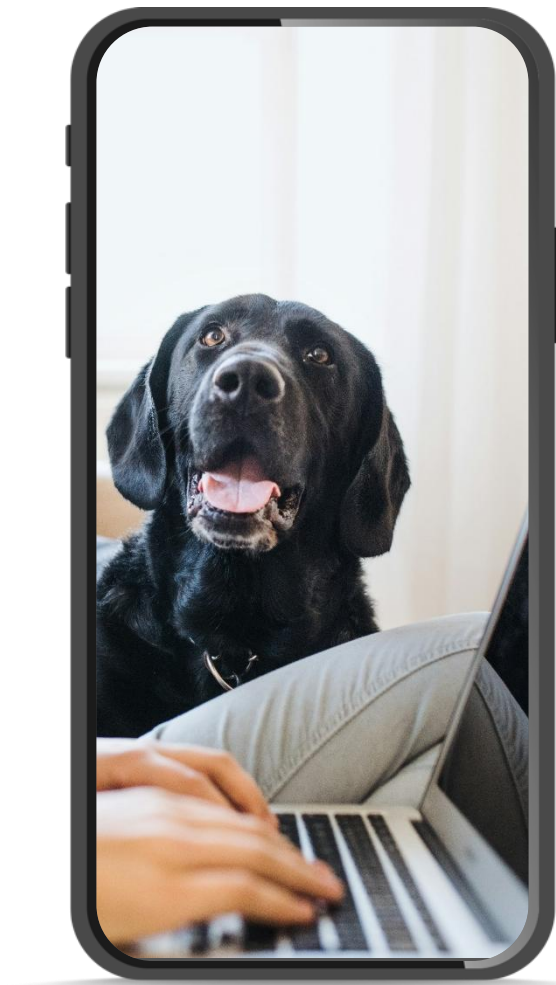
On-line sales are growing in Canada, but slower than brick-and-mortar stores and losing share

Traditional B&M stores don't do a lot of on-line sales, with Costco and the Pet Stores doing less than 10% of their volume as such

Performance of Total Pet Food – split between in store and on-line
Vol. \$, Latest 52 weeks, Canada



Channel	In store	On-line
Pet Stores	90,7%	9,3%
Mass Merch Stores	62,6%	37,4%
Grocery Supermarkets	96,4%	3,6%
Warehouse Club	90,5%	9,5%
Dollar Stores	100%	
General Merch. Stores	97,6%	2,4%
Hardware/Garden Stores	100%	
Food Delivery Service		100,0%
Drug Stores	100%	



Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

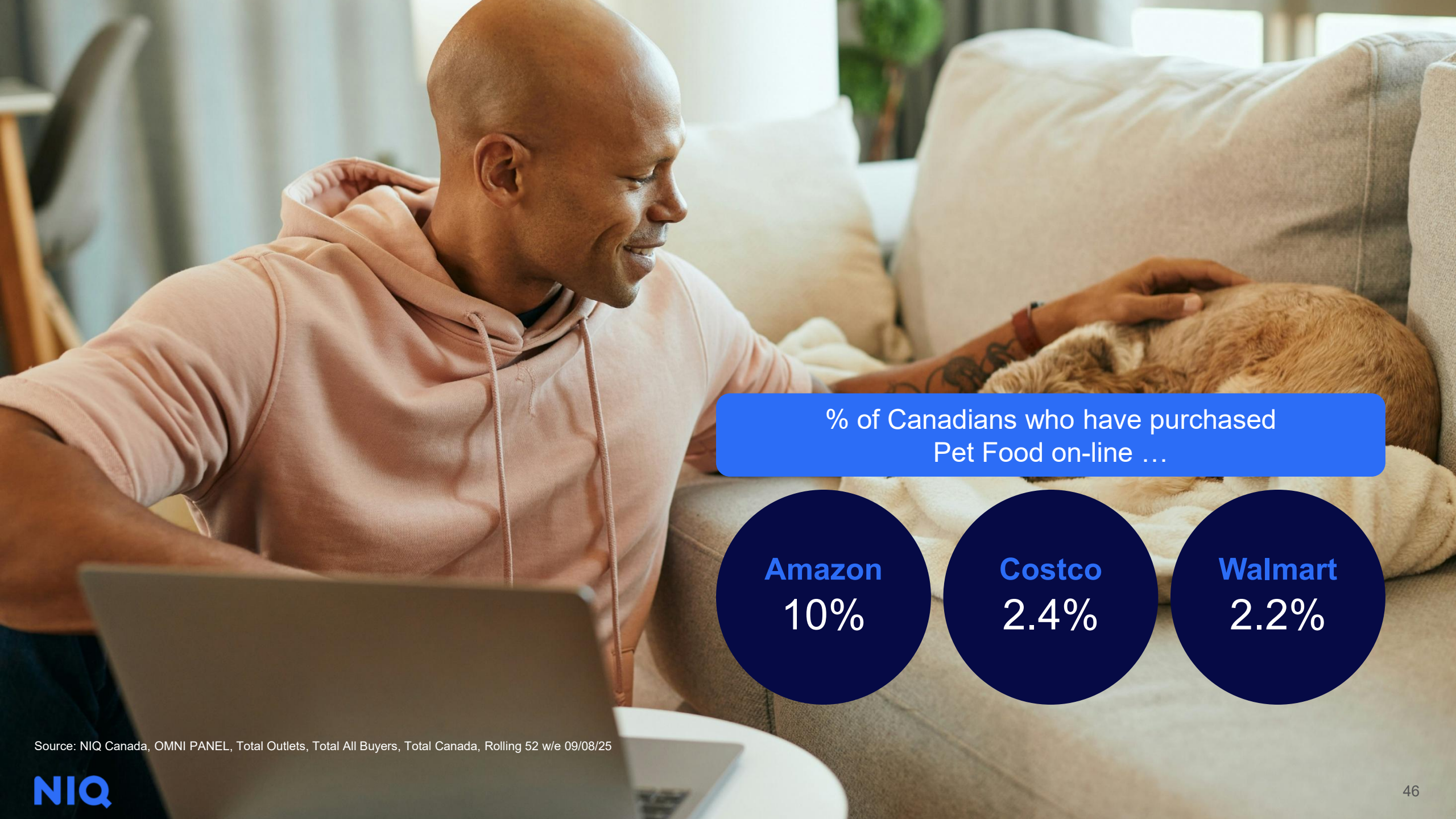
Amazon is the #1 online destination to buy Pet Food in Canada, followed by Petsmart

Top banners by type of sales
Vol. \$, Latest 52 weeks, Canada

On-line	In store
Amazon	Pet Valu
PetSmart	Walmart
Walmart	PetSmart
Costco	Costco
Pet Valu	Dollarama
JE Mondou	JE Mondou
RCSS	Global Pet Food
Instacart Rem	Canadian Tire
Instacart Costco	RCSS
Loblaws	No Frills

Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25





% of Canadians who have purchased
Pet Food on-line ...

Amazon
10%

Costco
2.4%

Walmart
2.2%

Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

ANIMALERIE

PET CARE

% of Canadians who have purchased Pet Food in store ...

Walmart
36%

Dollarama
32%

Costco
19%

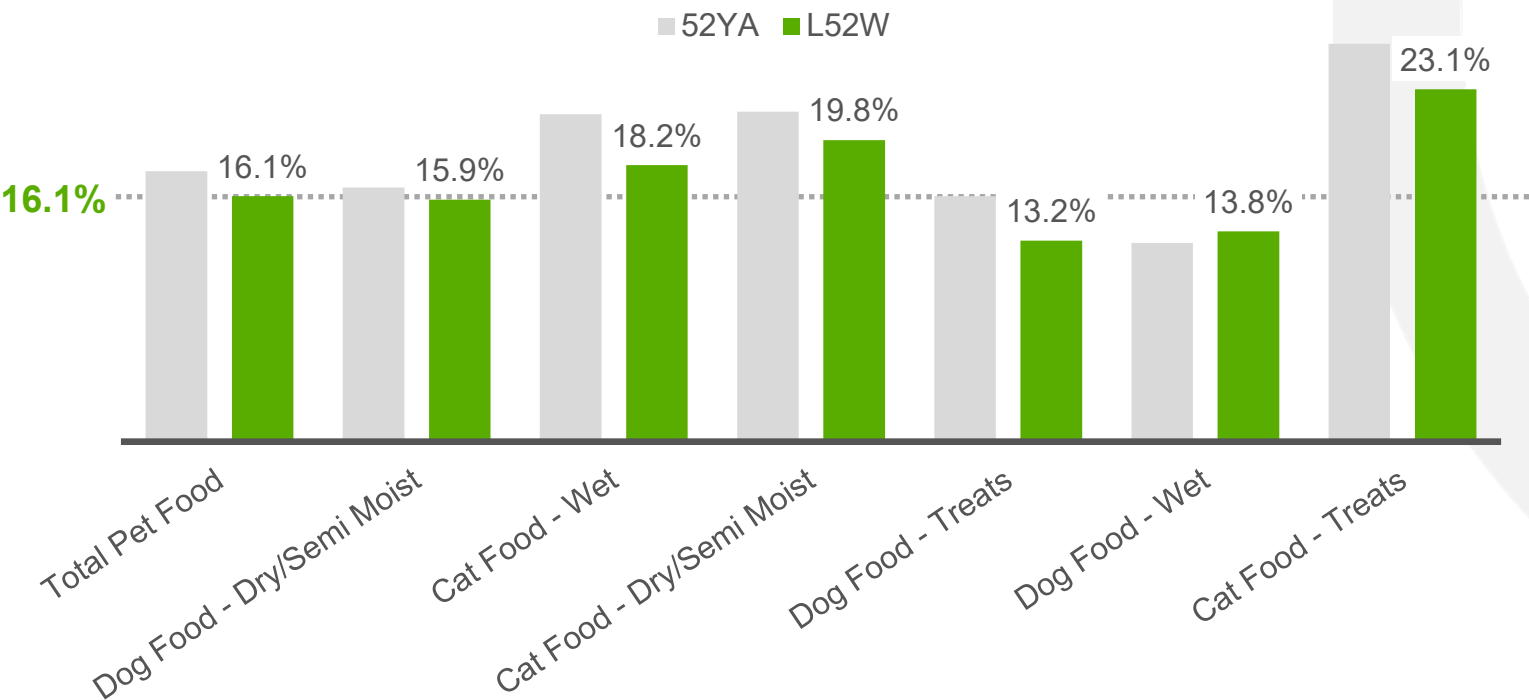
Pet Valu
15%

PetSmart
14%

Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

In general, Canadians buy more Cat categories on-line – but levels have slightly dropped vs year ago

Importance of on-line Total Pet Food
Vol. \$ Share, Canada



Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25



On-line = bigger transactions, but smaller spend overall, as number of occasions is lower

Consumer dynamics of Total Pet Food in Canada
All Buyers, Canada

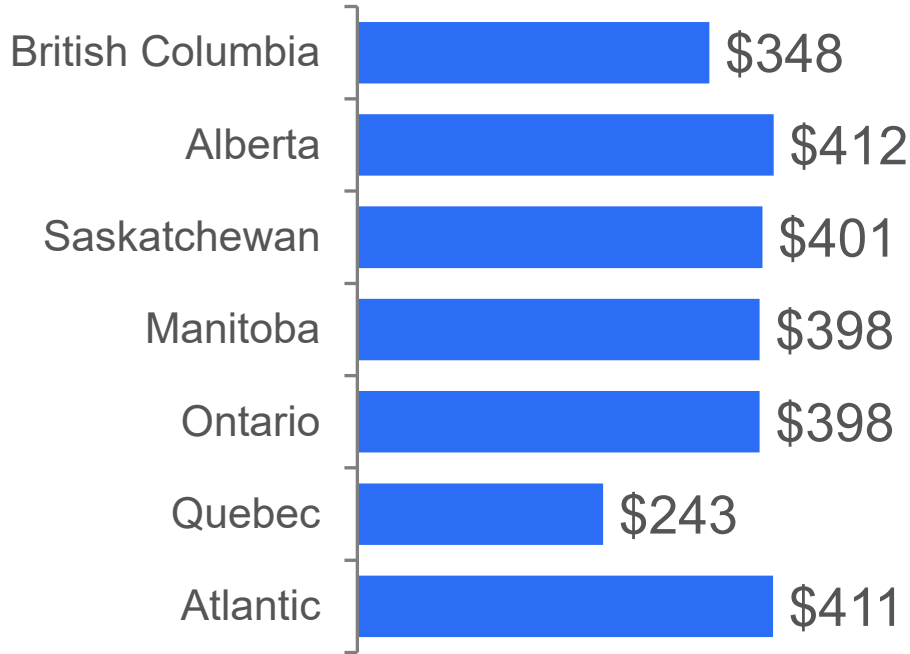
	Total	In store	On-line
Penetration	72%	71%	16%
Value per buyer	\$356	\$304	\$252
\$ per occasion	\$21.85	\$20.45	\$33.99
Occasions per buyer	16.3	14.9	7.4
Units per occasion	3.0	3.1	2.4

Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25



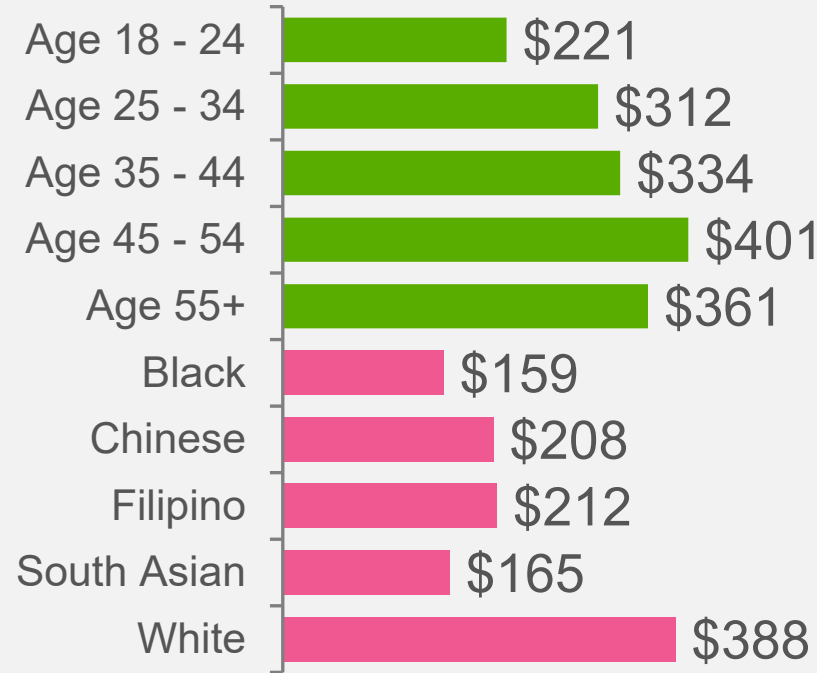
Québec households spent (a lot) less on pet food categories (vs national average of \$356)

Value (\$) per buyer spent on Total Pet Food by province
All Buyers, All Outlets, Canada



Different consumers, different priorities!

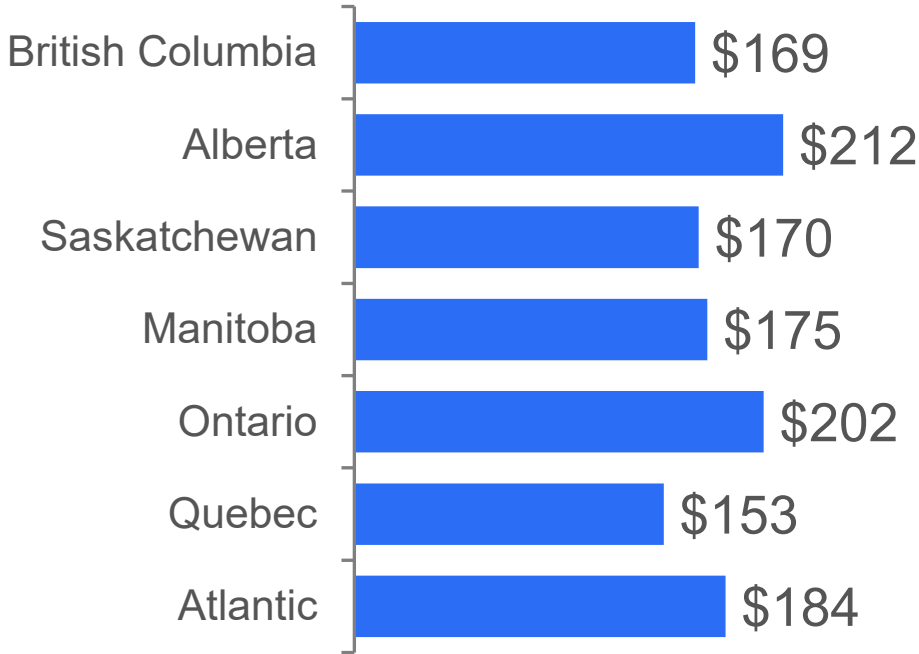
Value (\$) per buyer spent on Total Pet Food by household type
All Outlets, Canada



Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

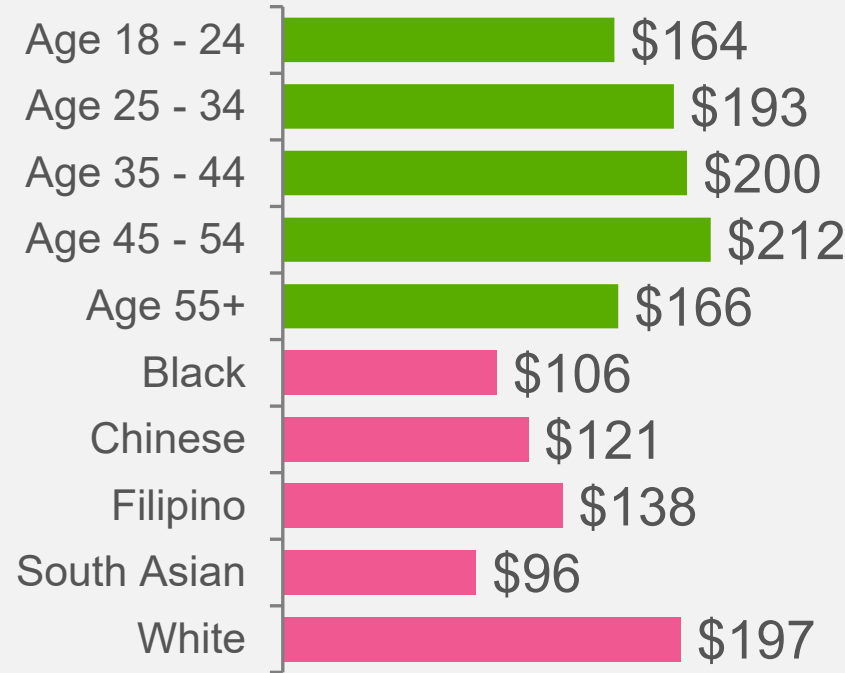
There are less differences when looking at how much Canadian households spent on overall Pets & Pet Care categories

Value (\$) per buyer spent on Total Pets & Pet Care by province
All Buyers, All Outlets, Canada



Younger Canadians spent less on food (or food quality?) but will spend more to pamper and take care of their animals

Value (\$) per buyer spent on Total Pets & Pet Care by hhld type
All Outlets, Canada



Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

Canadians are more open to buying Pet Care categories on-line – where HHLD who did spend more overall (vs in-store)

Consumer dynamics of Total Pets & Pet Care in Canada
All Buyers, Canada

	Total	In store	On-line
Penetration	69%	64%	27%
Value per buyer	\$183	\$112	\$196
\$ per occasion	\$20.49	\$15.79	\$34.44
Occasions per buyer	8.9	7.1	5.7
Units per occasion	1.4	1.5	1.3

Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

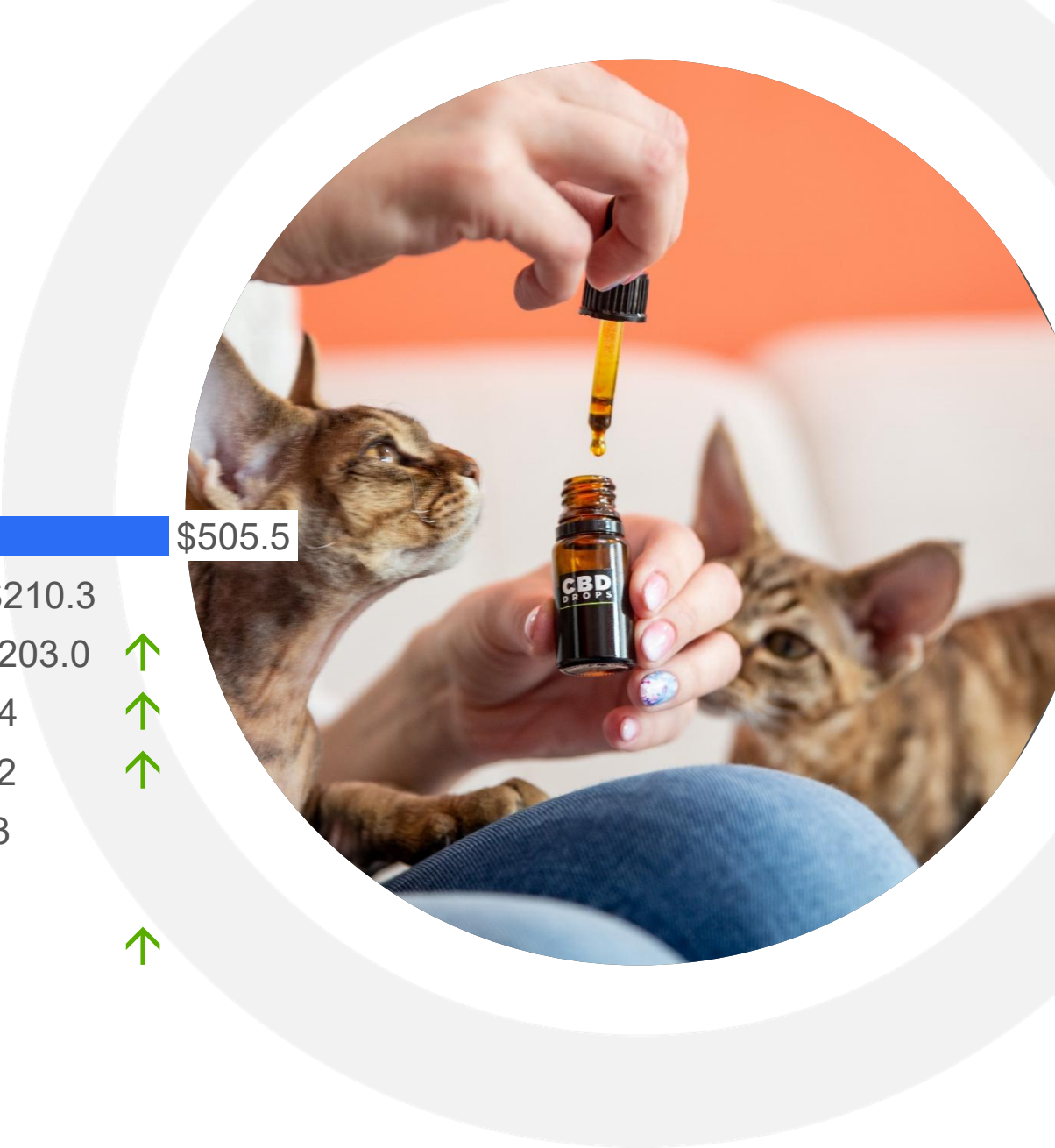


Canadians are following trends observed down South, spending more on categories to care for their pets as a ‘member’ of their family

Performance of Total Pets & Pet Care
Vol. \$, Latest 52 weeks, Canada

\$2.07B

Sales (vol. \$) of
Pets & Pet Care
in all Canadian
stores measured
by NIQ’s OMNI
panel



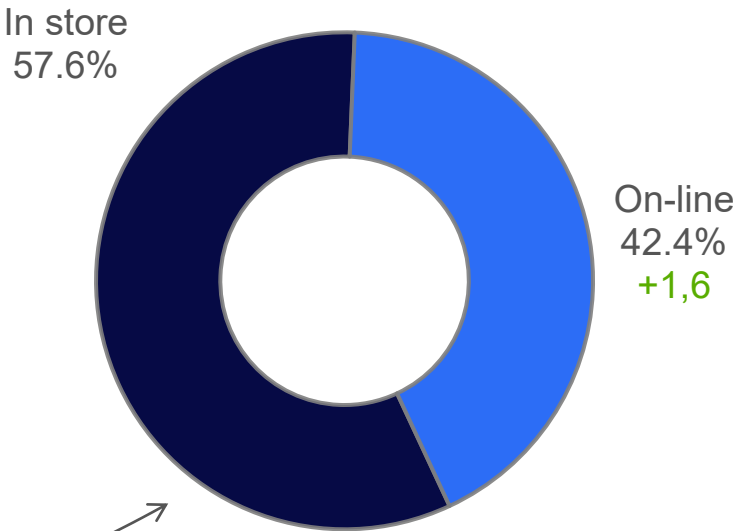
Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

On-line sales are more developed for Pets & Pet Care categories and winning share vs YA

Performance of Total Pet Food by channels *Vol. \$, Latest 52 weeks, Canada*



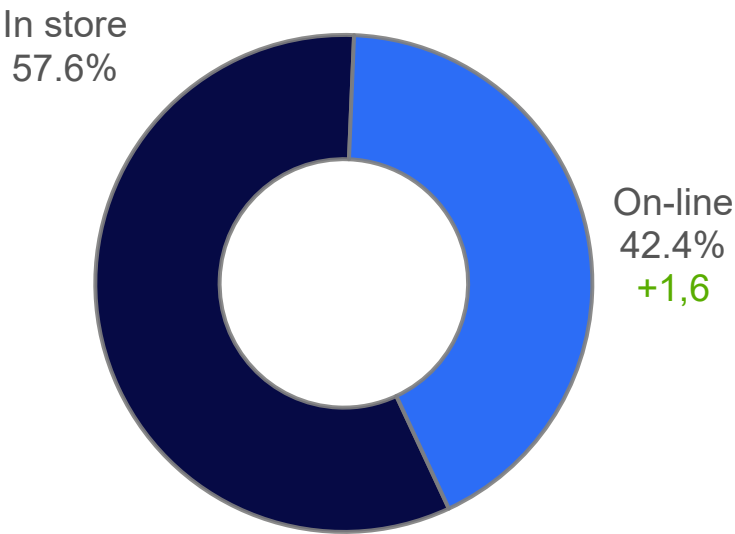
Channel	Shr (\$)	Shr Pt Chg
Mass Merch Stores	49,1%	0,1
Pet Stores	28,9%	0,4
Warehouse Club	6,1%	0,3
Dollar Stores	5,3%	-1,0
Grocery Supermarkets	5,2%	-0,4
General Merchandise Stores	3,1%	0,0
Hardware/Garden Stores	0,8%	0,0
Food Delivery Service	0,6%	0,1
Drug Stores	0,4%	0,1



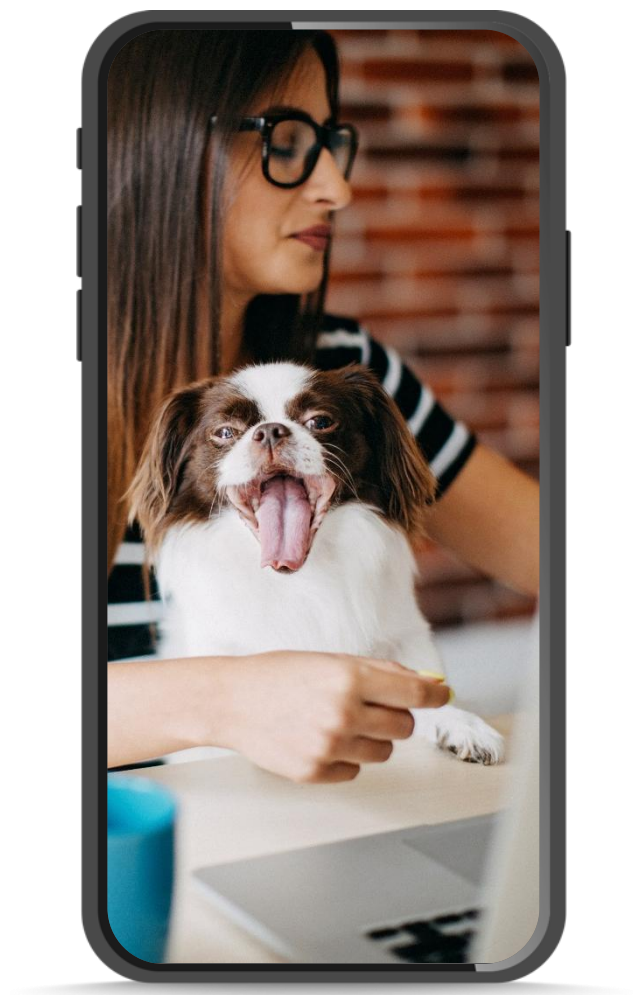
Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

On-line sales are more important for channels selling Pet Care categories

Performance of Total Pet Food – split between in store and on-line
Vol. \$, Latest 52 weeks, Canada



Channel	In store	On-line
Mass Merch Stores	22,6%	77,4%
Pet Stores	92,1%	7,9%
Warehouse Club	87,2%	12,8%
Dollar Stores	100%	
Grocery Supermarkets	94,9%	5,1%
General Merch. Stores	95,6%	4,4%
Hardware/Garden Stores	95,7%	4,3%
Food Delivery Service		100%
Drug Stores	98,8%	1,2%

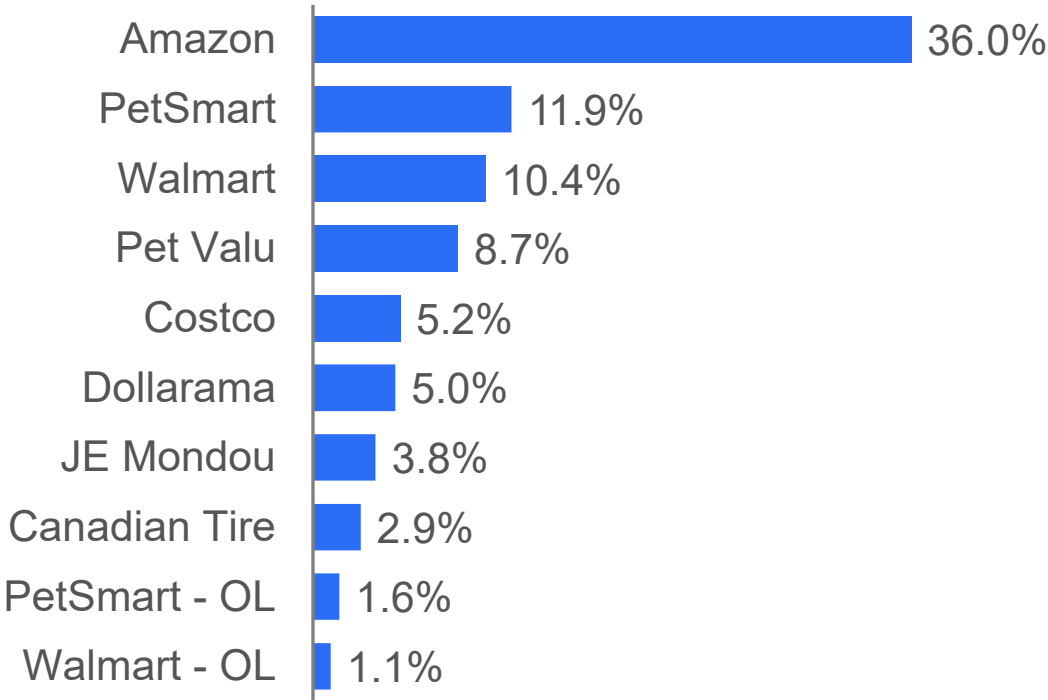


Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25

39% of Canadians purchased Pet Care categories in the past year

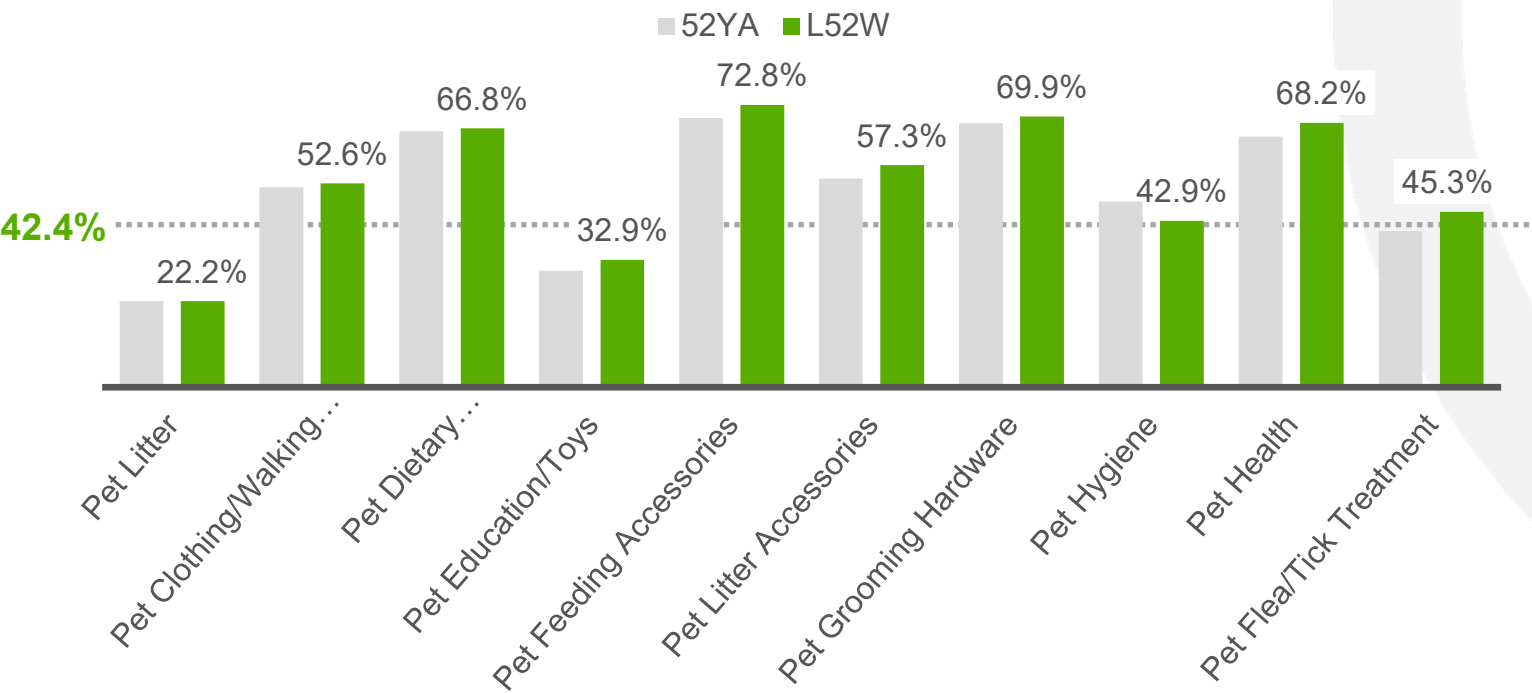
The retailer has made 1/3 of all sales of these categories last year in Canada

Top 10 banners for Total Pets & Pet Care
Vol. \$, Latest 52 weeks, Canada



With the exception of Litter, on-line remains a destination for the majority of Pet Care categories

Importance of on-line Total Pets & Pet Care
Vol. \$ Share, Canada



Source: NIQ Canada, OMNI PANEL, Total Outlets, Total All Buyers, Total Canada, Rolling 52 w/e 09/08/25





90%

of CPG searches
on Amazon are
unbranded

Source: NIQ 2025 Private Label & Branded Products report 2025 survey, NIQ 2024 Enhancement Demographic Study, Dec. 2024

Pet brands have an opportunity to grow the size of prize with consumers

They must seize consumers' openness to trying "whichever" brand fits their needs.

Needs-driven decisioning

57%

of Canadians consumers say brand or store brand is irrelevant
→ they just buy what they need



Broader consideration sets

48%

of Canadians say they're buying more brands across more categories than ever before



Captive shopper audiences

57%

of Canadians say if they look hard enough, they can find a brand that fits their exact needs



Source: NIQ 2025 Private Label & Branded Products report 2025 survey

**More and more,
Canadians are
moving to needs-
based shopping**



Pet parents are
putting their
dollars behind
three key
themes

Products
that are
good for
the planet

Products
they
believe are
better for
their pets

Products
that ease
being a pet
parent

10 Growth Trends in 2025 following those themes

#1

**Sustainable
Packaging**

#2

**Zero Waste/
Upcycled**

#3

**Fresh
Food**

#4

**Human
Grade**

#5

**Alternative
Proteins**

#6

**Sustainable
Fishing**

#7

**Dye
Free**

#8

**Electronic
Enhancement**

#9

**Health
Monitoring**

#10

**DIY Pet
Owners**

Real opportunities to match overall Canadians' efforts to buy more sustainable products

Sustainable Packaging

\$ % change vs year ago	All Products	Claimed Sustainable Packaging
Total Store	2.2%	5.3%
Pet Care	0.3%	18.6%

Recyclable • Made With Recycled Materials • Please Recycle This Paperboard Carton • This Package Can Be Recycled • BPA Free • Please Recycle • Recycle Me Please • Bag Made With Up To 30 Percent Plant Based Plastic • Recyclable • Ecologically Friendly Bag • USDA Certified Biobased Product Packaging • Recyclable • If Clean And Dry • USDA Certified Biobased Product Packaging • 30 Percent • Minimum Content • Sustainable Packaging • Resealable • Recyclable Pack • 100 Percent Recycled Plastic • Ecologically Friendly Packaging • Bag Made With 40 Percent Post Consumer Recycled Material • 40 Percent Post Consumer Recycled Plastic Packaging • Recycled Plastic Packaging • Recyclable • Sustainable Forestry Initiative • 25 Percent Recycled • Green Partnerships • Eco Friendly Materials • This Box Made With Partial Post Consumer Recycled Material • Bio Flex • Ecologically Sustainable • Earth Friendly • Sustainable Forestry Initiative Certified Sourcing • 10 Percent Recycled Material • Made With 50 Percent Wind Energy • Drop Off Plastic Bag • Recycle If Clean And Dry • Recyclable Where Facilities Exist • Certified Earth Friendly • This Pckg May Not Exst Yr Ar • Protective Atmosphere • Love Your Planet • Original Sourcing • Please Dispose Of Thoughtfully • Good For Earth • Earth Friendly

162 total observed claims in Dry Dog Food alone

Zero Waste & Upcycled

	Zero Waste (% of sales)
Total Store	0.2%
Pet Food	0.9%
Oral Hygiene	2.3%
Packaged Tea	15.4%
Hair Care	1.5%

Upcycled Pet Care growing 30%+



Sustainable Fishing

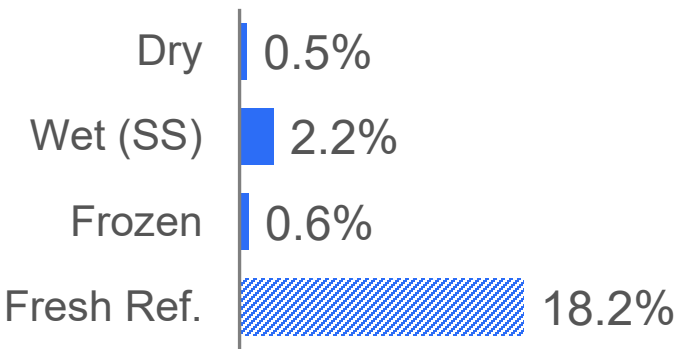


Source: NielsenIQ Retail Measurement Data, xAOC (Non-Pet) and Pet Retail Plus (Pet) channels, Latest 52 Weeks Ending 06/28/25

Canadians are trying to feed themselves – *and their pets* – better!

Fresh Food

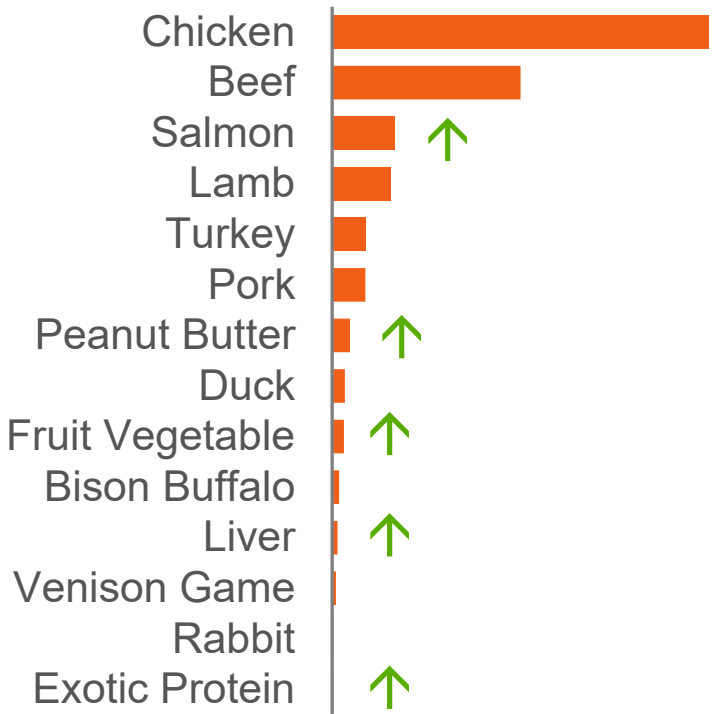
Vol. units % chg (Cat + Dog)



3%
of Total Dog +
Cat Food \$
sales (USA)

Alternative Protein

Dog Food + Treats flavor sales and trend



Dye Free

47%
of Pet Food does
not contain Color
Additives - *but only
18% are claiming
to be Artificial
Color/Dye Free on
packaging*



Source: NielsenIQ Omnisales, Omnisales+ | Entire Dataset and Retail Measurement – Pet Retail Plus Channel, 52 Weeks Ending 06/28/25, Source: NielsenIQ Retail Measurement Data, Total US Pet Retail Plus, Latest 52 Weeks Ending 06/28/25

High-End products for pets go mainstream in North America



Humanisation of Pet Food

- Brands are innovating with new formats and ingredients that mirror human food trends.
- Baby food-style pouches, frozen pet meals like bone broth popsicles, and exotic protein options are becoming more mainstream.
- These offerings cater to pet parents who prioritize premium, high-quality nutrition for their animals.

Pet Functional Foods & Supplements

- Pet supplements are gaining traction, with expanded offerings in categories such as immune support, calming aids, mobility enhancement, and collagen-infused formulations.
- Novel ingredients, including mushrooms and colostrum powder, are becoming increasingly popular for their perceived health benefits.

Sustainability

- Sustainability is becoming a key differentiator, as consumers seek responsibly sourced ingredients and eco-friendly packaging.
- This trend presents an opportunity for manufacturers to align with evolving pet parent priorities.

Source: NIQ, [Global Pet Expo 2025: Key Trends & Themes - NIQ](#)

**More and more
pet parents are
using techno-
logy to make
their lifes
easier**



**Pet Video Cameras and Treat
Dispensers are now \$6.4M in sales
and growing 104% year-over-year**



**Pet Electronic Collars are now over
\$21M dollars in sales and growing
44% year-over-year**



**Pet Electronic Food Dispensers,
while only \$3M in sales are
growing nearly 60% year-over-year**

Source: NielsenIQ Retail Measurement Data, Total US Pet Retail Plus, Latest 52 Weeks Ending 06/28/25

New tools are
convenient,
easy to use,
available on
phones

"Tangle-free cleaning"



"No. More. Pooptastrophies."



Bird feed stations



Source: Birdbuddy

Smart cat toilets



Source: Casa Leo



1 of 4 vacuums
are *Pet friendly* and
growing 4x as fast
vs. all vacuums*

DOLCE & GABBANA

< FEFÉ

SKIN BEAUTIFIERS

MAKEUP

VELVET COLLECTION

PERFUMES FOR HER

PERFUMES FOR HIM

FEFÉ

EXCLUSIVE SET



ENGRAVE *NIQ*



Dolce&Gabbana Fefé
Woody and musky notes

+ Size Select size



\$99



\$1.2B

\$ sales in US of **Pet Grooming** categories

+9% vs 2YA

Shampoo → \$205M

Brushes → \$185M

Source: NIQ Omnishopper Panel Latest 52 Weeks ending 12th July 2025

Look outside
your traditional
realm of pet
expertise for
your next
opportunity!



OUAI Fur Bébé
Pet Shampoo



Goa Organics
Goa Friends



MALIN + GOETZ
Dog Shampoo



LolaVie Puppy Love
Dog Shampoo



Aesop Animal



Kiehl's Cuddly-Coat
Cleansing Spritz



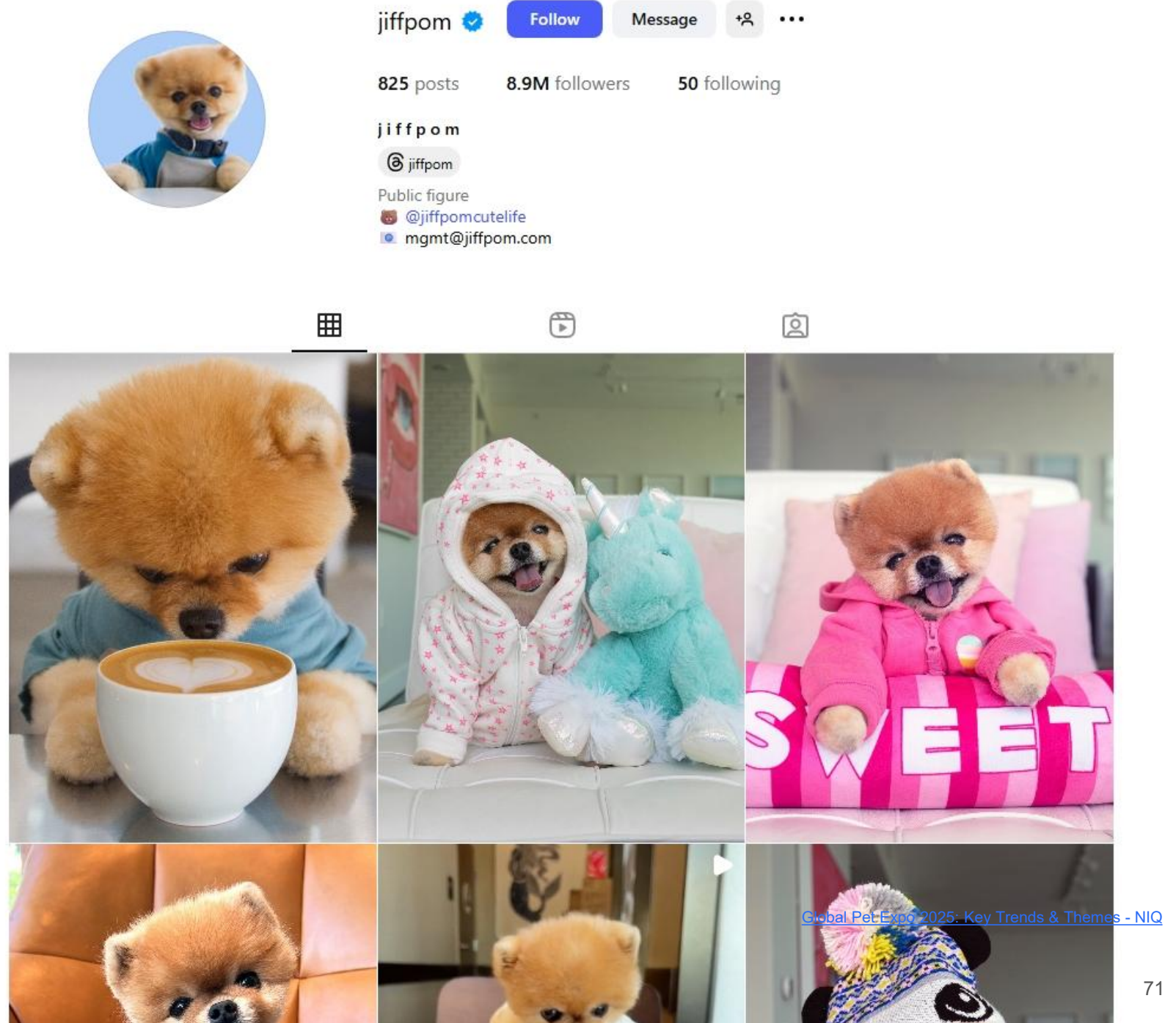
Rare Beauty Soft
Pooch Blush Dog Toy



Bondi Wash Kennel
Spray & Dog Wash

Take advantage of Influencer Pets

Influencer pets are playing a larger role in shaping consumer purchasing behaviors, as social media-savvy pet parents seek to replicate the lifestyles they see online, particularly for Gen Z. Brands are capitalizing on this trend by partnering with pet influencers and leveraging user-generated content to build trust and engagement



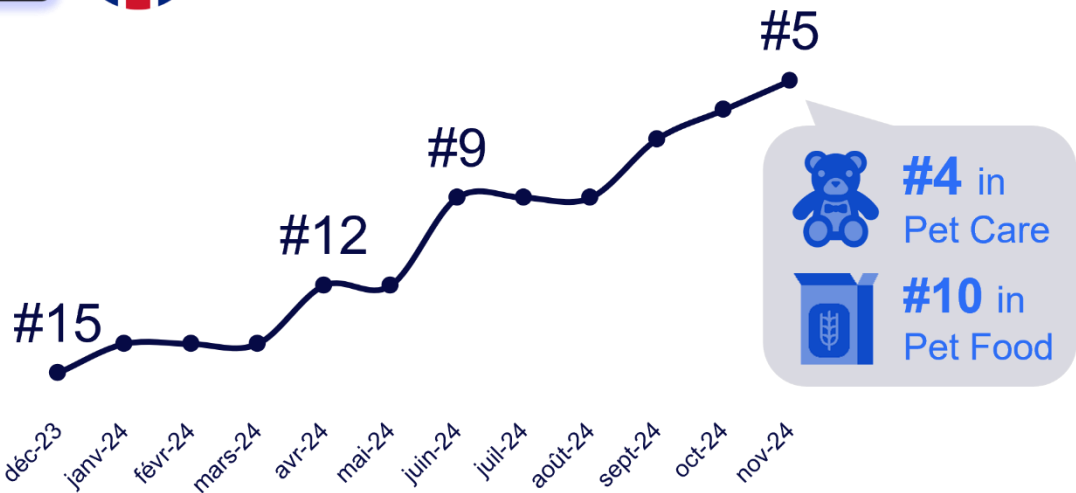
Social Commerce is on the rise

TikTok is already the 5th biggest online merchant in the UK

TikTok performance in UK 2024



TikTok Shop value share rank within
ecommerce merchants for UK Pet



Source: NIQ, [Global Pet Expo 2025: Key Trends & Themes – NIQ](#), NielsenIQ FoxIntelligence



TikTok’s Influence in Canada on Pet

TikTok has emerged as a powerful force in the pet care space, influencing product discovery and driving direct purchases.

Consumers turn to the platform for pet-related content, engaging with viral trends and influencers.

This presents a significant opportunity for pet brands to leverage cross-promotional strategies, influencer partnerships, and in-app purchasing features to reach highly engaged audiences.



40%

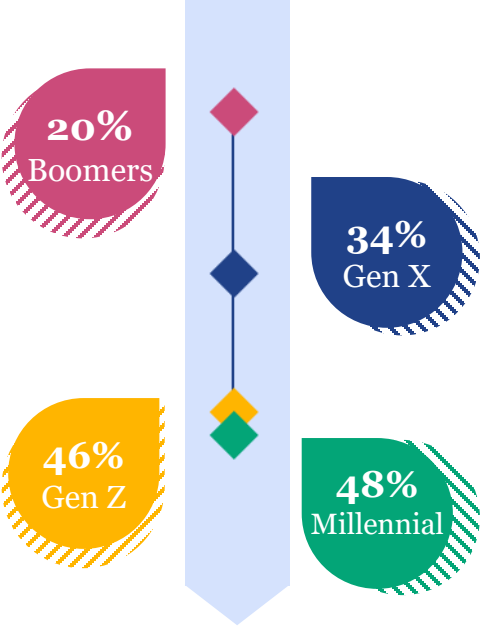
of Canadians
consumers are
likely to **accept a
recommendation
from an AI
assistant**

47%
Global

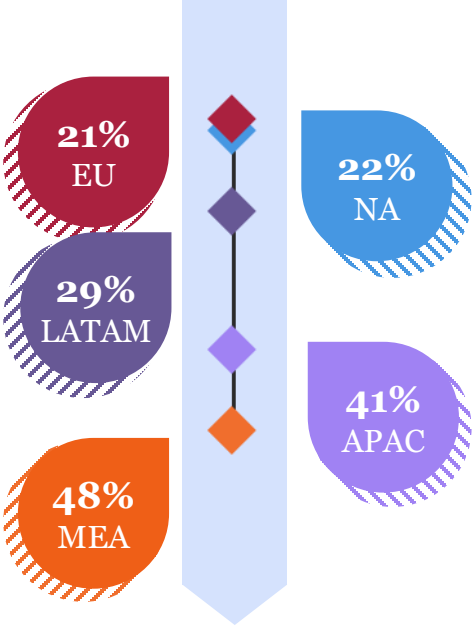
Source: NIQ 2025 Private Label & Branded Products report 2025 survey

Younger consumers – especially in Asia Pacific and EMEA regions - are more open to embracing AI to decide which products to buy

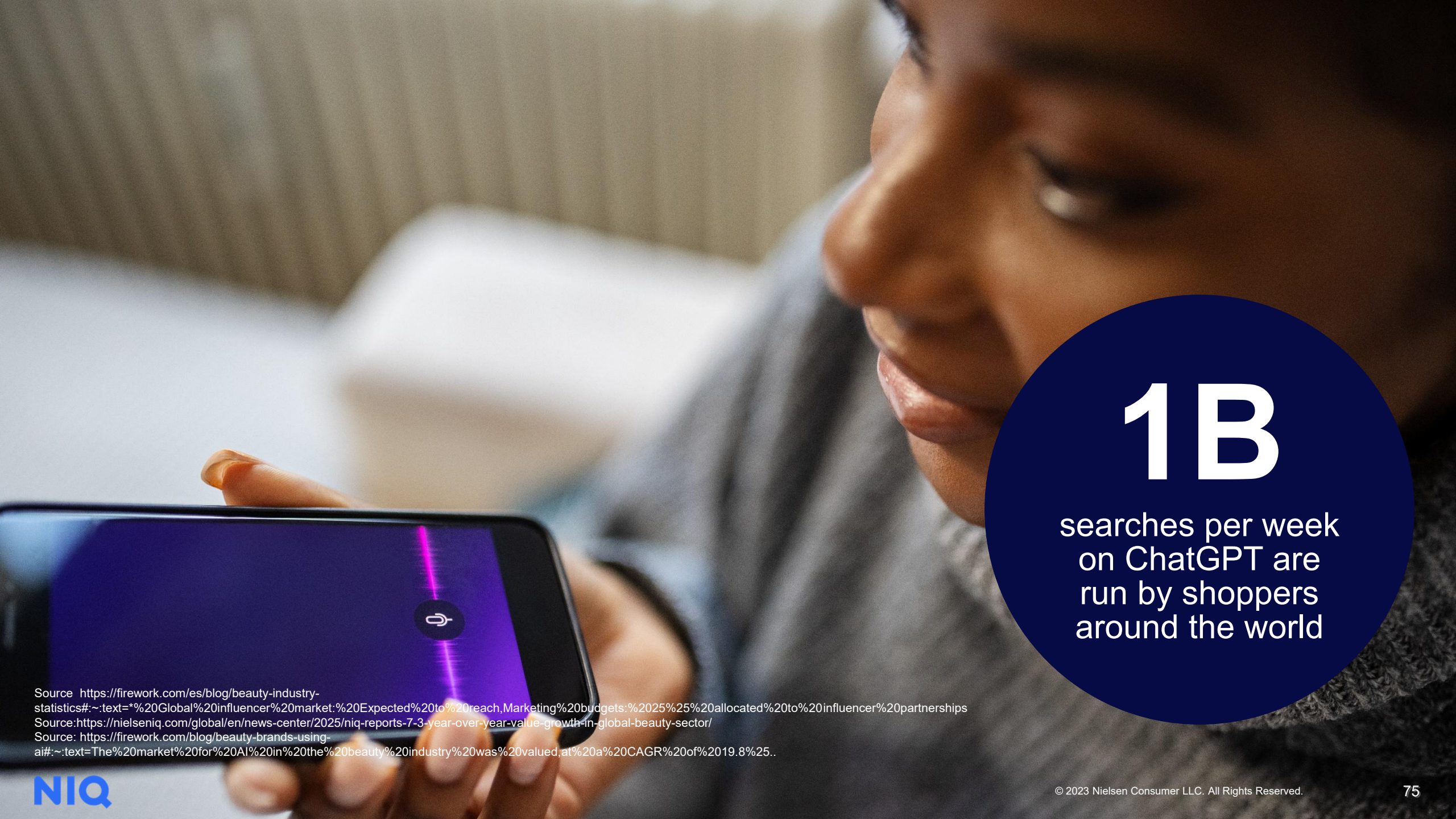
40% of consumers are *likely to leverage AI* to automate and speed up their everyday shopping decisions



34% of consumers are likely to purchase a product they have only examined or experienced through *Augmented Reality or Virtual Reality*



Source: NIQ Mid Year Consumer Outlook 2024



1B

searches per week
on ChatGPT are
run by shoppers
around the world

Source <https://firework.com/es/blog/beauty-industry-statistics#:~:text=%20Global%20influencer%20market:%20Expected%20to%20reach,Marketing%20budgets:%2025%25%20allocated%20to%20influencer%20partnerships>
Source:<https://nielseniq.com/global/en/news-center/2025/niq-reports-7-3-year-over-year-value-growth-in-global-beauty-sector/>
Source: <https://firework.com/blog/beauty-brands-using-ai#:~:text=The%20market%20for%20AI%20in%20the%20beauty%20industry%20was%20valued,at%20a%20CAGR%20of%2019.8%25..>

ChatGPT: What is the best cat food in Canada for my aging cat?



Per ChatGPT: An affordable option that doesn't compromise on performance, this cat food provides dramatic volume and length, making it a cult favorite among beauty enthusiasts



Shoppers are running over 1B web searches per week on ChatGPT



Shopping buttons are coming soon to ChatGPT



ChatGPT able to provide detailed feeding routines, including product options

Copilot now offers an option to use Microsoft Stores to buy ‘certain’ products – but not easily linked to recommendation

For a senior cat who spends time outdoors, you'll want to balance **age-specific nutrition** with the **extra energy and resilience** outdoor life demands. That means:

- **High-quality, easily digestible animal protein** to maintain lean muscle mass as your cat ages
- **Taurine** for heart and eye health (especially important for outdoor cats)
- **Healthy fats** like omega-3 and omega-6 for joint support, brain function, and coat health
- **Moisture-rich options** (wet or fresh food) to support kidney function and hydration
- **Added antioxidants** to help the immune system fight off outdoor pathogens
- **Joint-friendly nutrients** like glucosamine and chondroitin if mobility is slowing

Here are some top-rated options that fit both *senior* and *outdoor* needs:

Brand & Formula	Why It's Good for Senior Outdoor Cats	Type
Smalls Fresh Cat Food	Human-grade meat, no fillers, high moisture, tailored portions for age and activity 1 2	Fresh (subscription)
Purina ONE Indoor Advantage 7+ Chicken & Ocean Fish Pate	Multi-protein, hydrating, supports lean muscle and immune health 2	Wet
Dr. Elsey's Cleanprotein Chicken Recipe	High protein, low carb, calorie-dense for active seniors 2	Dry
Taste of the Wild Rocky Mountain	42% protein, novel meats (venison, salmon), prebiotics for digestion 3	Dry

Pro tip:

- If your cat is outside in colder months, slightly increase calorie intake to help maintain body temperature.
- Rotate between wet/fresh and dry to balance hydration and dental health.
- Schedule regular vet checkups — outdoor seniors are more exposed to parasites, injuries, and infections.

If you'd like, I can put together a **weekly feeding plan** that blends wet, dry, and fresh options so your cat gets variety and complete nutrition without digestive upset. Would you like me to do that next?

Yes — there are some widely sold cat food brands and product lines that experts and reviewers often flag for **low-quality ingredients, excessive fillers, or unnecessary additives** that aren't ideal for senior cats, especially those with the extra wear-and-tear of outdoor life.

From recent reviews and veterinary commentary, here are a few that frequently appear on "avoid" lists:

Brand / Product Lines	Common Concerns	Why It Matters for Senior Outdoor Cats
Purina Kit & Kaboodle	High in corn gluten meal and other grain fillers; vague meat by-products	Low-quality protein can strain aging kidneys and muscles
Friskies (some dry formulas)	Artificial colors, flavor enhancers, and low meat content	Adds empty calories without supporting joint or immune health
Meow Mix Original Choice	Corn, soy, and wheat as primary ingredients; minimal named meat sources	Outdoor seniors need nutrient-dense protein, not filler carbs
9Lives Daily Essentials	Meat by-products, artificial preservatives (BHA/BHT)	Preservatives may be harder for older livers to process
Certain Royal Canin & Blue Buffalo lines	Some recipes use plant-heavy protein sources, carrageenan in wet food	Can cause digestive upset or inflammation in sensitive seniors 1 2 3

Microsoft Advertising

For senior outdoor cats, Hill's Science Diet offers tailored nutrition with high-quality protein and added antioxidants, perfect for maintaining health and vitality. These options are designed to support aging cats' unique needs.

Sponsored ...

Hill's Pet Nutrition Science Diet...
CA\$67.19
\$24.70 / 1 kg
Amazon CA
Free shipping

Anti Spill Tilted Cat Food Bowls,...
CA\$5.87
Temu Canada

Hill's Science Diet Adult 7+ Senior...
CA\$65.34
\$33.17 / 1 kg
Amazon CA
Free shipping

Hill's Science Diet Senior 7+ Indoor...
CA\$54.89
\$17.32 / 1 kg
Amazon CA
Free shipping

Hill's Science Diet Senior 7+ Outdoor...
CA\$65.11
\$17.41 / 1 kg
Amazon CA
Free shipping

Source: <https://chatgpt.com/>

OpenAI teaming up with Shopify to pilot a native shopping feature within ChatGPT

- This would enable users to browse, compare & purchase products from Shopify merchants—without leaving the chat interface



**OpenAI** · Apr 28, 2025
@OpenAI · Follow

We're excited to announce we've launched several improvements to ChatGPT search, and today we're starting to roll out a better shopping experience.

Search has become one of our most popular & fastest growing features, with over 1 billion web searches just in the past week 🇺🇸

**OpenAI** ·
@OpenAI · Follow

Shopping

We're experimenting with making shopping simpler and faster to find, compare, and buy products in ChatGPT.

✓ Improved product results

✓ Visual product details, pricing, and reviews

✓ Direct links to buy

Product results are chosen independently and are not ads. [Show more](#)

11:30

ChatGPT 4o

What's the best espresso machine under \$200 that comes close to the taste of coffee in Italy?

If you're aiming to recreate the ambiance of an Italian café at home without exceeding a \$200 budget, there are several espresso machines that can deliver rich, authentic flavors. Below are some top picks that balance quality and affordability:



Versatile Choice

De'Longhi ECP3220 Espresso Machine
\$119.95
De'Longhi and 9 others



Compact Design

Gevi Compact P Semi-Automatic Espresso Machine
\$124.99
GEVI and 3 others

ChatGPT chooses products independently. [Learn more](#)

Top Selections Explained:

- De'Longhi ECP3220 Espresso Machine**
Versatile Choice
With adjustable controls and

40% of consumers would leverage AI to automate and speed up their everyday shopping decisions

De'Longhi Stilose Manual Espresso Machine

★★★★★ 4.3 412

 **De'Longhi** **\$99.95**  [Buy](#)

De'Longhi Stilosa Manual Espresso Machine
Free delivery by Wed, Apr 30, · 30-day returns

 **Walmart** **\$90.99**  [Buy](#)

De'Longhi Stilosa Manual Espresso Machine
Free delivery

 **BrandsMart USA** **\$89.99**  [Buy](#)

De'Longhi Stilosa Manual Espresso Machine
Free delivery by Thu, Apr 24, · 30-day returns

40% of consumers would accept a product recommendation from their AI assistant

Source: <https://www.emarketer.com/content/openai-shopify-chatgpt-ecommerce-integration>
Source: <https://www.techradar.com/computing/artificial-intelligence/shopify-is-hiring-chatgpt-as-your-personal-shopper-according-to-a-new-report/>, Source Mid-Year Consumer Outlook: Guide to 2025

NIQ

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78

**Winning in this environment
requires a relentless focus on
the consumer**

Challenged Canadians are buying pet categories in different ways

We are getting into a world of needs-based decisions in stores across the country

Canadians still **stressed** about CPG prices



Canadians are stressed by CPG prices and this pressure is influencing their shopping behaviours across categories—including pet products. As consumers seek better value, convenience, and promotions, many are exploring alternative channels such as discount retailers.

Different dynamics in different channels



Different pet categories perform differently across retail channels, and tailoring strategies accordingly is essential to capture consumer demand effectively.

Conscious buying



Canadians are increasingly focused on eating healthier and feeding their pets better, all while making choices that support the planet through sustainable and responsible consumption.

Innovation fulfilling needs-based decisions



Selling pet categories is becoming increasingly challenging as the number of platforms grows and brands competes for consumer attention; make sure your innovation is fulfilling a 'real' need and that you choose the right platform to grow..



Francis Parisien

francis.parisien@nielseniq.com

VPP ventes PME Canada

<https://www.linkedin.com/in/francis-parisien/>

