



Pet Retail 2025: Navigating Industry Emerging Trends on the Show Floor

SUPERZOO 2025

Andrea Binder

VP, Pet Industry Insights Leader



NIQ provides the *Full View*™ of the total pet market

The only holistic view of pet available in the industry



Complete pet channel measurement

The only complete pet channel measurement available in the industry *across the total store* including pet food, treats, consumables, hardlines, and supplies.



Expansive omnichannel pet coverage

A *true omnichannel view* with brick & mortar, e-commerce, and omni breaks. Expansive specialty pet, conventional, and online retail coverage with rich POS data and the industry's best omni panel data for a complete view of the market.



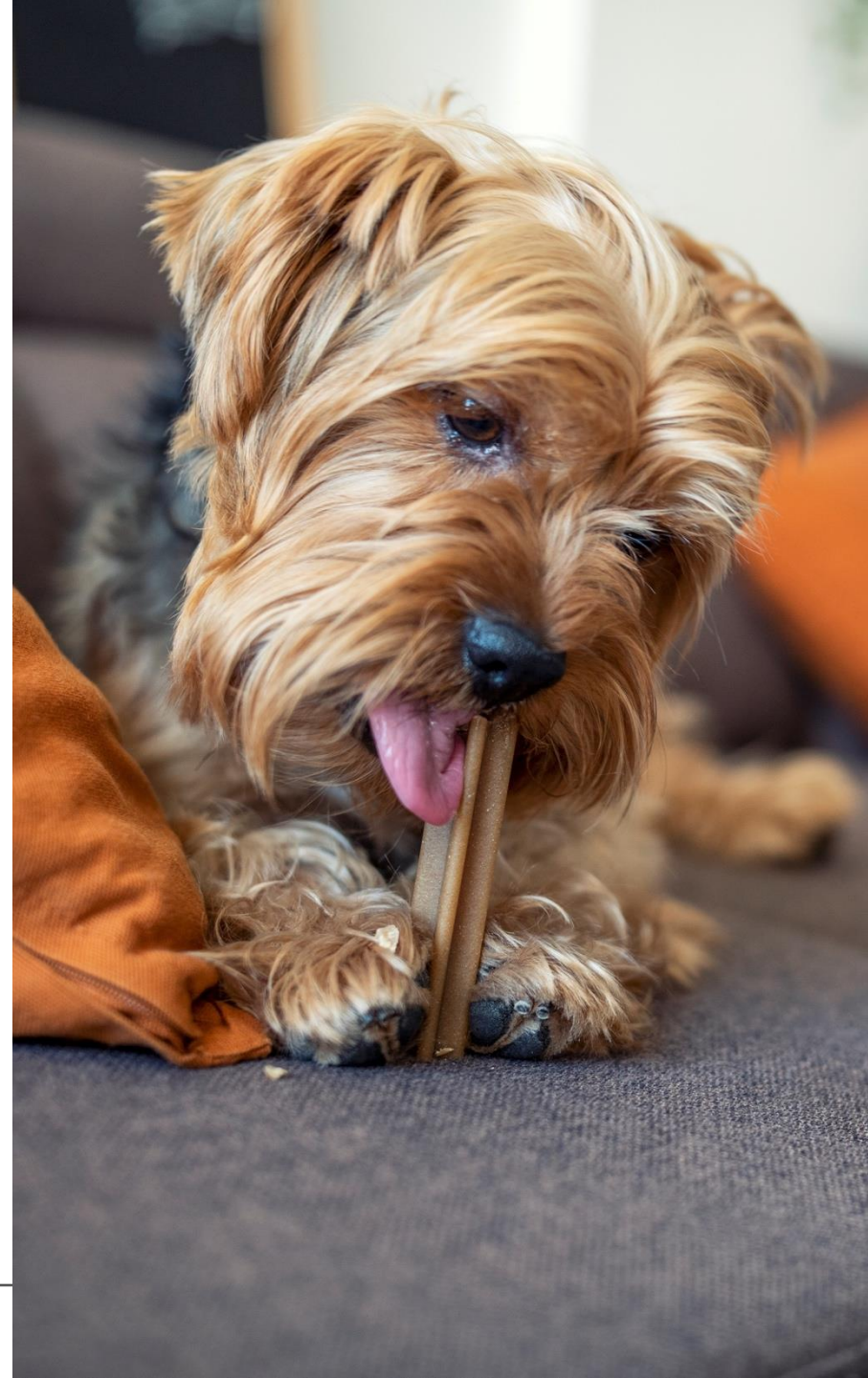
Unmatched pet attribution & item database

The *most extensive pet item database*, robust product attribution data, and custom pet characteristics for critical granularity into complete market truth.

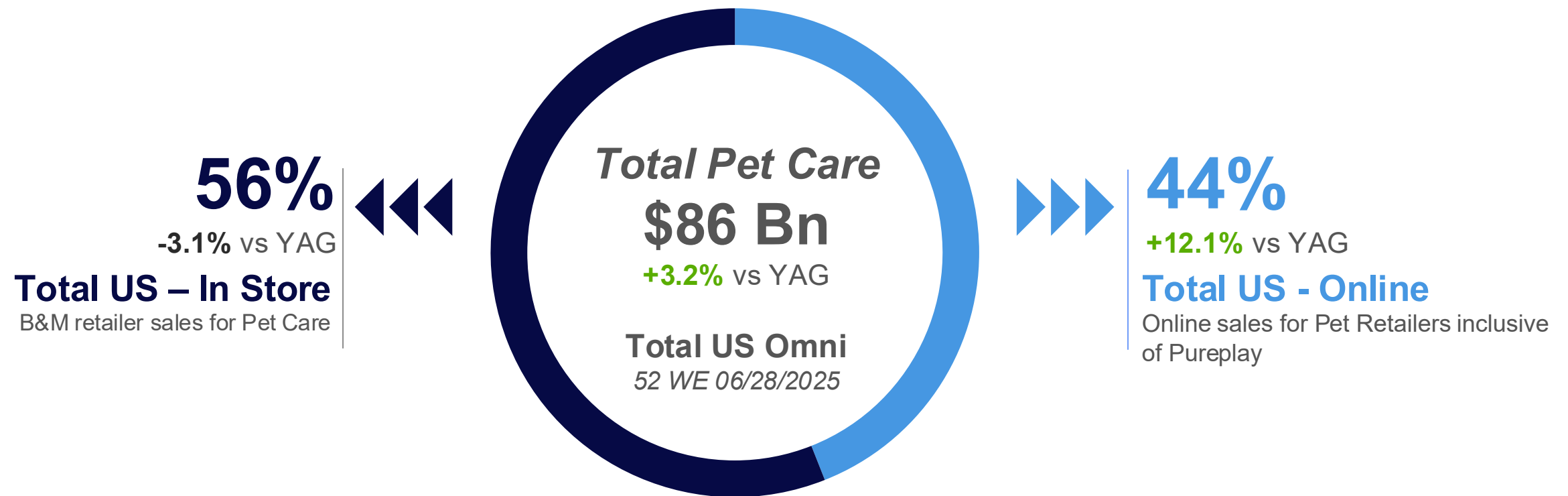


Pet industry leaders

We are the primary provider to the vast majority of pet manufacturers and pet retailers of all sizes - and a *strategic partner to APPA, WPA, and IndiePet*.



Pet Care totals over \$86B fueled by Online's double-digit growth

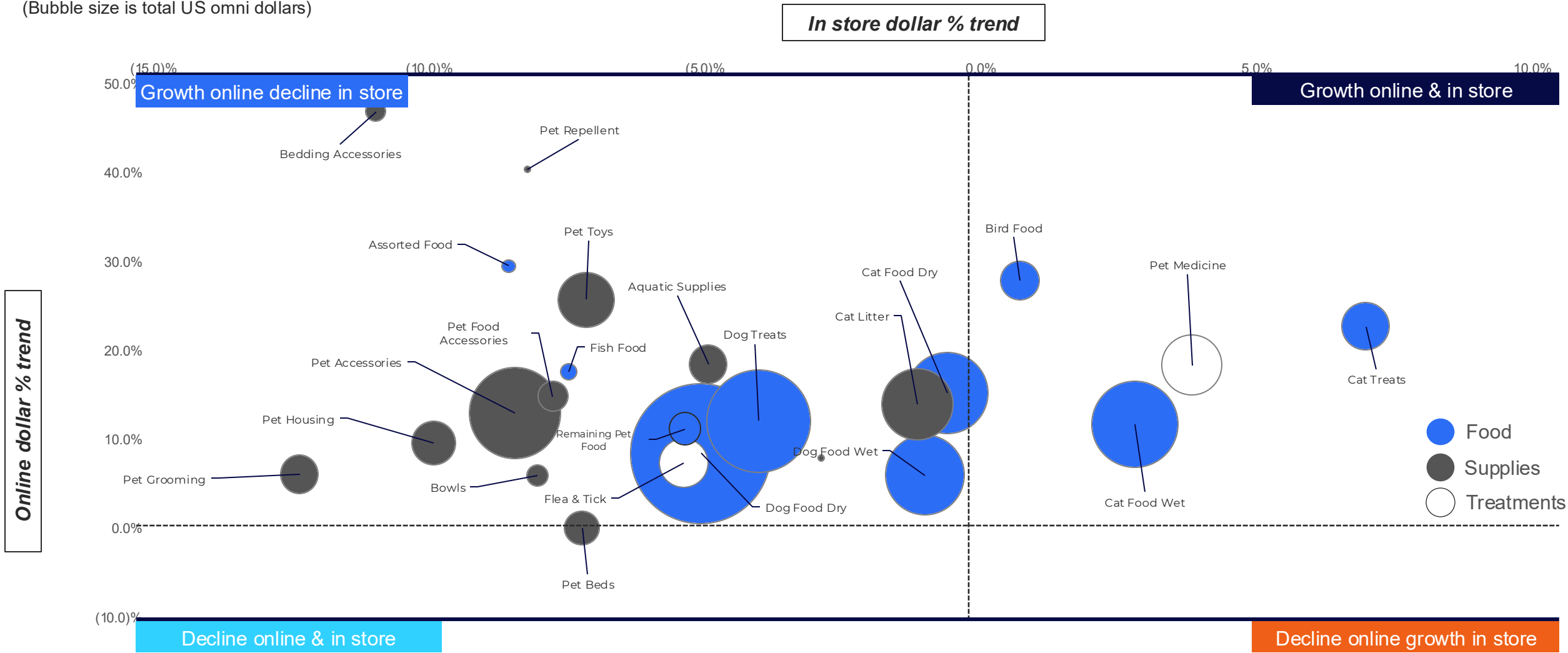


Source: NIQ Omnisales+; Pet Care Total Omni Dollars, L52W w/e 06/28/25

More categories continue to see declines in store but growth online

Total omni dollar sales by pet care category

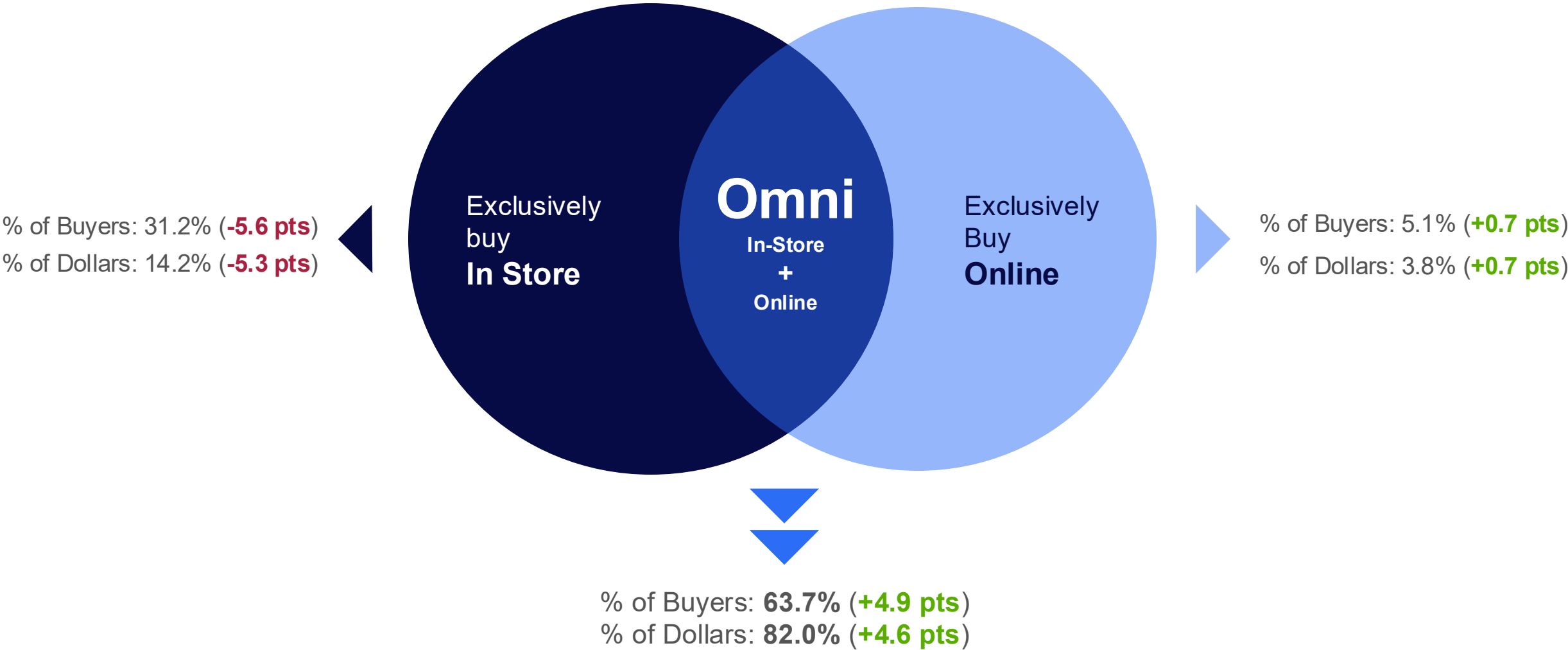
(Bubble size is total US omni dollars)



Source: NIQ Omnisaless+; Pet Care by Category, Total Omni Dollars, L52W w/e 06/28/25

True Omni shopping Pet parents now make up 82% of all dollars in Pet Care

Where are Total Pet Care buyers making their purchases?



Source: NIQ Expanded Omnishopper Panel, Total Pet Care, L52W W/E 07/12/25 vs. YAG



**How can
stores and
brands stay
relevant in
this evolving
market?**

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**

#1

Sustainable Packaging

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

\$ contribution	Qualified Sustainable Packaging	Claimed Sustainable Packaging
Total Store	8.1%	0.1%
Pet Care	2.5%	0.1%

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 Package 30 Percent • Recycle If Clean And Dry • Recycled • Recycled Product Package 44 Percent • USDA Certified Biobased Product Packaging 30 Percent • Minimum Recycled Content • Sustainable Packaging • Resealable • Recycle Where Facilities Exist • Recycled • Recycled Plastic • Degradable Sustainable Packaging • Ecologically Friendly Packaging • Bag Made With Recycled Material • 40 Percent Post Consumer Recycled Material • 100 Percent Compostable Packaging • Recyclable Container • Terracycle • Sustainable Forestry Initiative • 25 Percent Recycled Plastic • Sourcing • Green Partnerships • Eco Friendly • Made With Post Consumer Recycled Materials • Post Consumer Recycled Material • Susta Pak • Bio Flex • Ecologically Sustainable • Earth First PLA • Sustainable Forestry Initiative Certified Sourcing • Pouch Is Made From 13 Percent Recycled Plastic • Material • Degradable • 96 Percent Of This Pckg Md Rnwbl Mtrls • Made With 50 Percent Wind Energy • Can And Dry Store Drop Off Plastic Bag • Recycle If Clean And Dry Store Drop Off Plastic Pouch • Recyclable Where Facilities Exist • Certified Earth Friendly • Recycl Prgrm Ths Pckg May Not Exst Yr Ar • Protective Atmosphere • Love Your Planet • Originative Sourcing • Please Dispose Of Thoughtfully • Good For Earth • Earth Friendly

• Clear claims and instructions • Partially clear claims and instructions • Unclear claims and instructions

162 total
observed
claims in
Dry Dog
Food alone

#2

Zero Waste/ Upcycled

Zero Waste To Landfill At Our Owned US Facilities
Our US owned facilities are zero waste to landfill. This means we don't put operational waste into landfills, where it could lead to water contamination or the generation of excess methane gas emissions.
All our factory waste streams are recycled, composted or, if necessary, incinerated to produce energy to be utilized.



ZERO WASTE	PRODUCT CATEGORY	ZERO WASTE \$ (in MM)	CONTRIBUTION TO CATEGORY
	TOTAL STORE	\$1,847	0.2%
	1. PET FOOD	\$474	0.9%
	2. ORAL HYGIENE	\$254	2.3%
	3. PACKAGED TEA	\$252	15.4%
	4. HAIR CARE	\$193	1.5%
	5. BEER/FMB/CIDER/SELTZER	\$129	0.6%
	6. BEVERAGES	\$92	0.1%
	7. LAUNDRY CARE	\$90	0.6%
	8. CANDY, GUM, MINTS	\$73	0.3%
	9. BREAD	\$71	0.5%
	10. OLIVES/CAPERS/PICKLED VEG	\$56	1.8%

Upcycled
Pet Care
growing
30%+

The Upcycled Certified program is designed to reduce food waste by promoting the upcycling food economy. Upcycled products use ingredients that have full nutritional value and are safe, but for various reasons, would have gone to waste.



#3

Fresh
Food

Number of Fresh Pet Food UPCs sold ...

749
in 2022

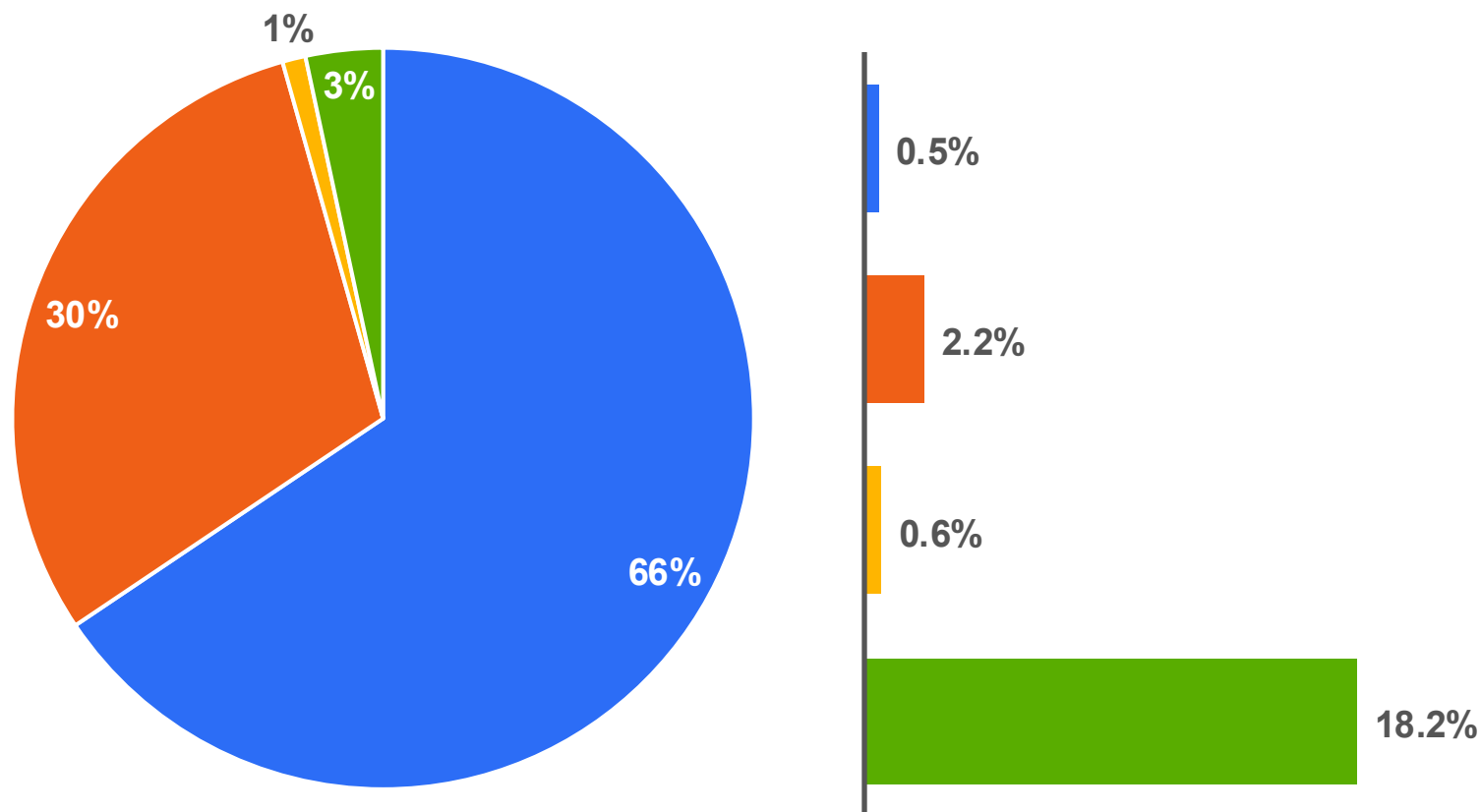
785
in 2023

803
in 2024

Already at
715
1H 2025!

Sales Contribution and Growth Rates Across Pet Food (Dog + Cat)

■ DRY ■ SHELF STABLE WET ■ FROZEN ■ REFRIGERATED



#4

Human Grade



While Human Grade claimed products are only 1% of total Pet Food...

**... they are
growing
sales at
nearly 20%
year over
year**

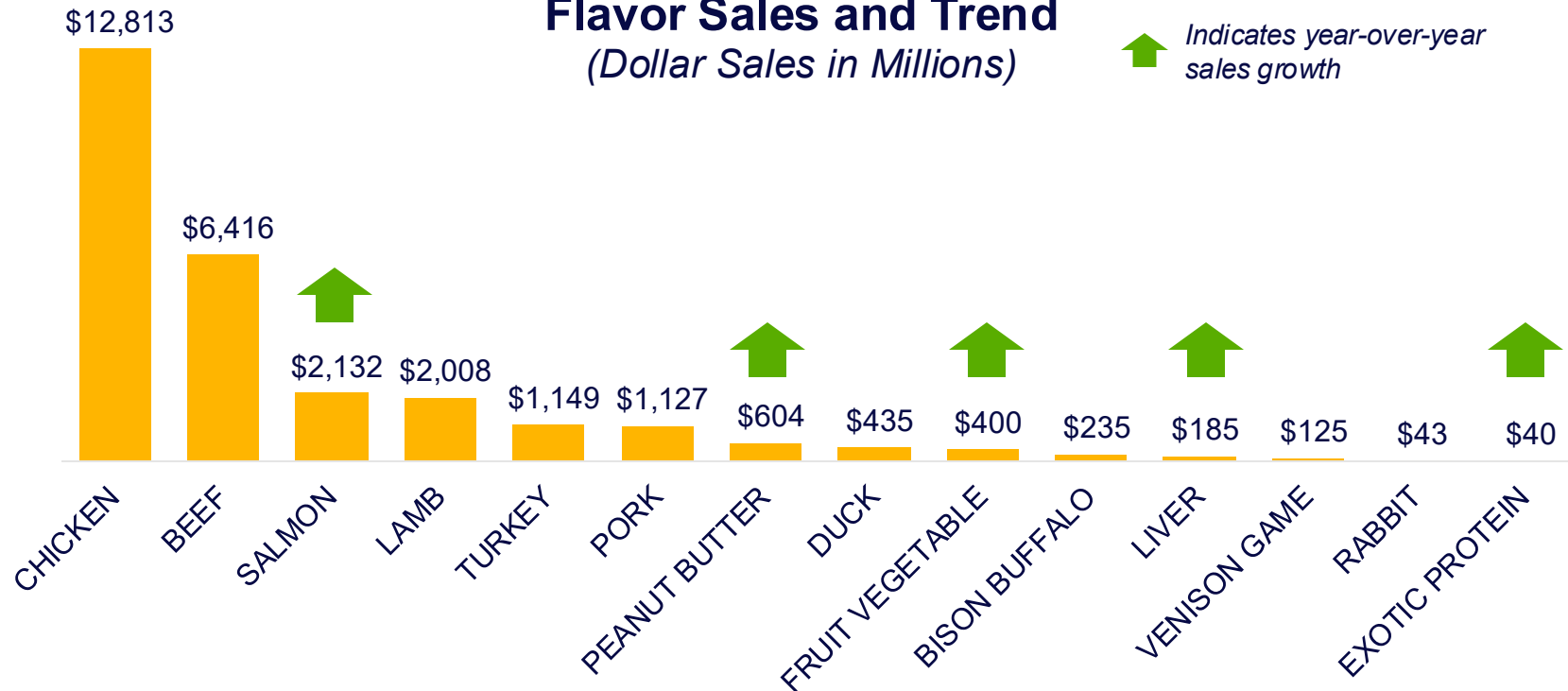
#5

Alternative Protein



Dog Food + Treats Flavor Sales and Trend (Dollar Sales in Millions)

↑ Indicates year-over-year sales growth



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

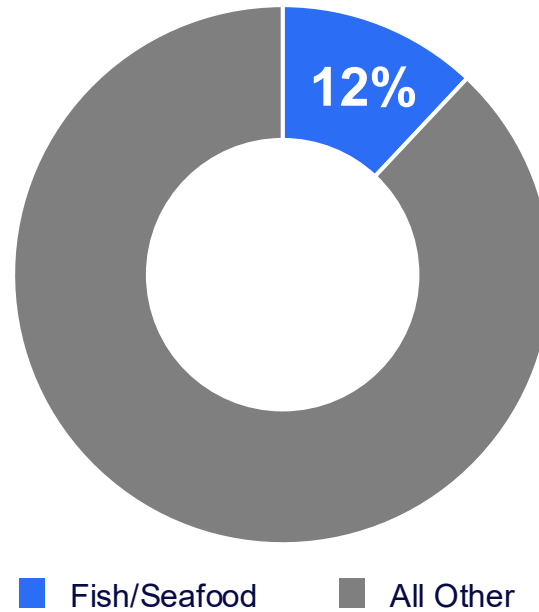
Confidential and proprietary

© 2025 Nielsen Consumer LLC. All Rights Reserved.

#6

Sustainable
Fishing

Fish/Seafood Flavor
Contribution to Dog + Cat Food



9.2%
Year-over-year
sales growth for
Sustainable
Fishing Dog and
Cat Food products

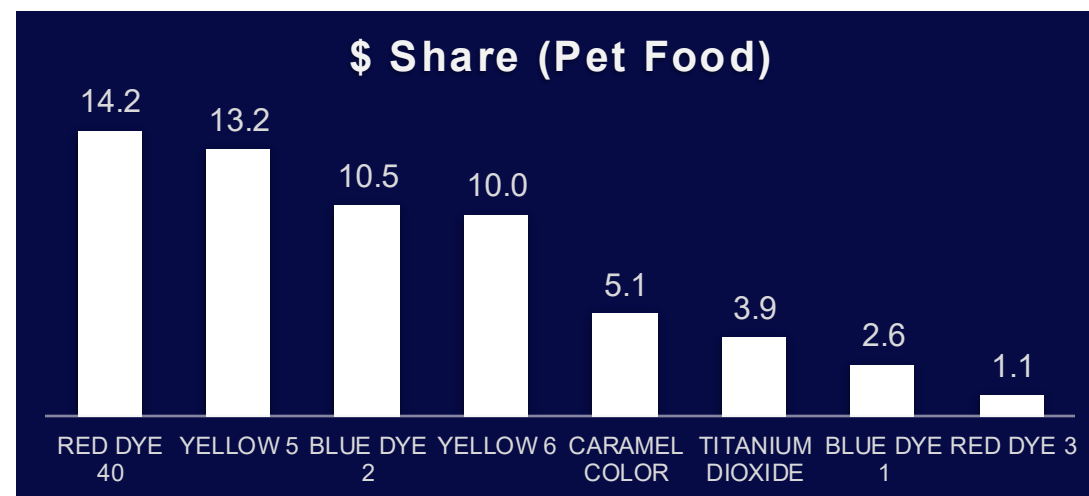
#7

Dye
Free

RED DYE #3 - MOST IMPACTED
NON-FOOD & BEV SUPER CATEGORIES
AVG. NUMBER OF ITEMS SELLING



... but Red Dye 3 is the lowest concern in Pet Food



47% of Pet Food does not contain Color Additives ...

... but only 18% are claiming to be Artificial Color/Dye
Free on their packaging!

#8

Electronic Enhancement



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

#9

Health Monitoring



Pet Services Including Vet

+5.6% vs LY

+0.2 pt vs Jun '25

Pet
Services*

+6.3%

+1.1 pt vs Jun '25

Vet
Services*

+6.4%

+0.5 pt vs Jun '25

Vet visits
declined in
2024 vs. 2023

At-Home Pet
Tests grew
9.2%
year-over-
year

#10

DIY Pet Owners

Price per Pound of key Pet Food segments

Segment	\$ Share	Avg Price/Lb
Total Pet Food	100%	\$2.54
Dehydrated	4.1%	\$8.10
Fresh & Frozen	3.8%	\$5.41
Meal Enhancers	2.5%	\$13.44
Freeze-Dried	1.2%	\$32.17

23%

of dog owners
are feeding their
dog(s)
homemade food
with human
ingredients



Let's hit the New Product Showcase to see these trends in action!

