



Purrsppectives

Pet

August 22nd, 2025

Fresh Food, Fresh Thinking: The Pet Industry's Next Big Shift

“Fresh food is no longer niche—it’s a growth engine. In the past year alone, fresh dog food sales have significantly outpaced the broader dog food category. Consumers are prioritizing transparency, clean labels, and human-grade ingredients, and they expect brands and retailers to deliver. For our clients, this is a signal to invest in innovation, rethink supply chains, and meet pet parents where their values are evolving.”



Andrea Binder
Vice President,
Pet Industry
Insights

“As pet parents demand more from what goes in the bowl, we’re entering a new era of personalized, functional, and wellness-driven nutrition. The next wave of growth will come from brands that can combine superior nutrition, trust and value to deliver not just meals – but meaningful pet health outcomes. The future of pet food is pet wellness.”



Yemi Owolewa
Pet Vertical
Leader

NielsenIQ

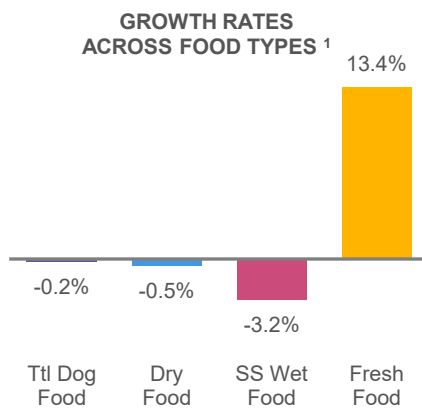
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While Dog Food struggles, Fresh finds growth avenues

Fresh Food growth is carrying the category

While Dog Food experiences year-over-year declines, the Refrigerated/Frozen food segment is seeing double digit growth. As remaining segments decline, Fresh is driving all growth for the category.

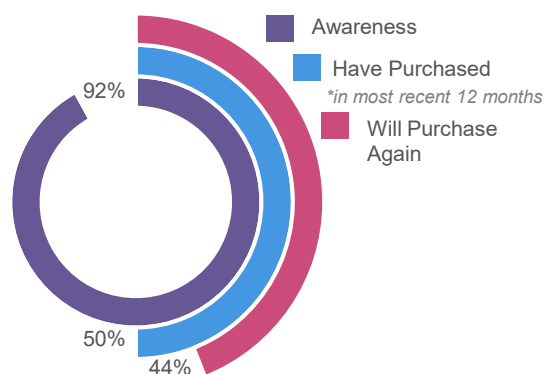


Fresh dog food
grew by
\$208M
in the last
year¹

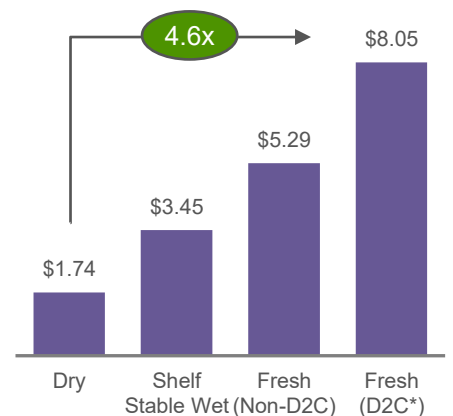
Gaining trial and breaking down cost barriers is necessary for continued growth

While most Dog Owners are aware of Fresh Dog food, recent trial is only at 50% and not all of those consumers are willing to purchase again. These pet parents indicate that cost is the #1 reason they do not purchase, or will not purchase again, as Fresh Food comes at a significant price premium on a price per pound basis.

CONSUMER AWARENESS & PURCHASE INTENT ²



AVERAGE PRICE PER POUND ^{1,3}



In-Store is the driving force for Fresh Food sales growth

Though many may know of Fresh Food options through Direct-to-Consumer companies, the truth is that mainstream Brick & Mortar retail is driving sales as most consumers purchase their fresh food in-store. These pet parents spend far more than the average dog food buyer, who spends, on average, only \$388 a year on all dog food purchases.



62%
are buying their
Fresh Food In-Store



\$560
average stated annual
spend on Fresh Food

Interested in learning more? Ask us about how you can access additional insights and full survey details.

¹ NielsenIQ Omnisales Data, Omnisales+ | Entire Dataset, 3 Years Ending 07/12/25

² NielsenIQ BASES Quick Question, Fresh Dog Food Custom Survey, n=500

³ Comparing The Cost of The Top Fresh Dog Food Brands, www.thepamperedpup.com