



Purrsppectives

Pet

December 30, 2025

Plateau or Pivot? The Future of Pet Care Subscriptions

“Subscription sales in Pet Care remain a cornerstone for loyalty and predictable revenue, but the market is signaling a shift. While autoship programs have been a differentiator, consumer resistance, driven by a desire for flexibility and price control, suggests that growth will hinge on evolving the value proposition. The next wave isn’t just about food; it’s about expanding into lifestyle and convenience categories to deepen engagement. Retailers and manufacturers should focus on creating subscription experiences that feel personalized and adaptable, to sustain momentum in a maturing market.”



Andrea Binder
Vice President,
Pet Industry
Thought Leader

Here’s what industry experts are saying:

“Our Autoship subscription program continues to be a pillar of strength and differentiation for Chewy, enabling high visibility and predictability in our business while also enhancing customer loyalty”

Sumit Singh
Chief Executive Officer,
Chewy



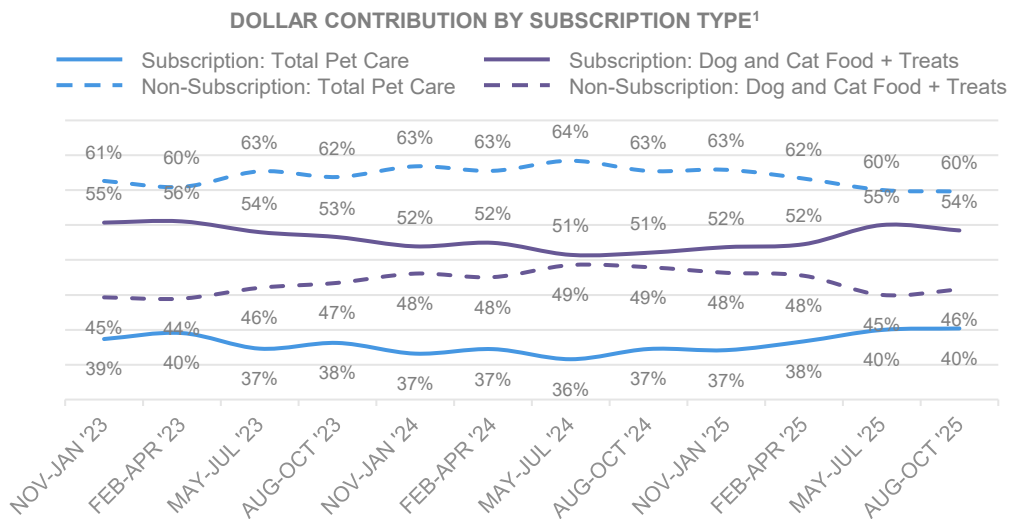
© 2025 Nielsen Consumer LLC. All Rights Reserved.



Implications for Pet Care Retailers and Manufacturers

Subscription sales account for 40% of Pet Care dollars

Subscription sales for Pet Care have ebbed and flowed over the last three years but saw increased contribution in the most recent 6 months, likely driven by the increased contribution of Subscription sales in Dog and Cat Food + Treats.



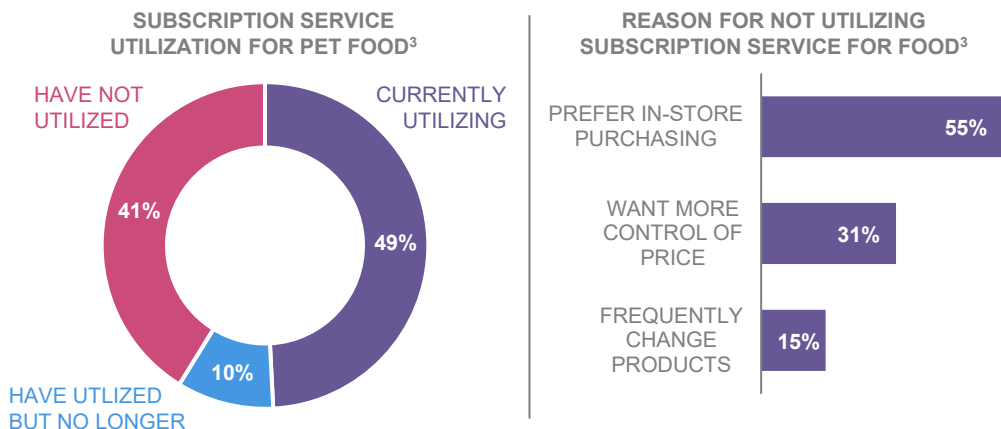
Routine categories drive the majority of subscription sales

While most consumers turn to Subscription programs for their Dog or Cat Food and Treats, routine treatment categories such as Flea & Tick and Wormers are close follows. Supplies categories are growing popularity though as all top growth categories are supplies.

SUBSCRIPTION SALES CONTRIBUTION TO TOTAL ONLINE SALES BY CATEGORY ²			TOP SUBSCRIPTION SALES GROWTH CATEGORIES ²	
CATEGORY	CONTRI-BUTION	CHANGE VS YA	CATEGORY	
DOG FOOD + TREATS	55%	+1.8	1. TOYS	
CAT FOOD + TREATS	51%	+2.0	2. COLLARS, HARNESSSES, LEASHES	
FLEA & TICK	46%	+2.2	3. FEEDING AND WATERING SUPPLIES	
WORMERS	45%	+3.3	4. GROOMING & BATHING	
LITTER	33%	+2.9	5. BIRD CAGES & ACCESSORIES	

Room for growth may be limited though

Subscription sales may be nearing a plateau. In a recent NIQ survey, 50% of consumers said they do not use subscription services for their dog or cat food needs, driven by pet parents preferring in-store shopping and wanting greater control over food prices.



¹ NielsenIQ Ecommerce Insights, Pet Supplies Demo Database, Total US E-Commerce, All Pet Supplies Products, 3 Years Ending 10/31/2025
² NielsenIQ Ecommerce Insights, Pet Supplies Demo Database, Total US E-Commerce, All Pet Supplies Products by Segment, 52 Weeks Ending 10/31/2025 vs. YA
³ NielsenIQ BASES Quick Question Survey, Pet Vertical Insights, October 2025, n=500