



Purrsppectives

Pet

February 27, 2026

The Year of the Horse: A New Frontier in Pet Care

“We’re entering a new era where Horse is no longer a quiet corner of Pet Care – it’s becoming one of its growth engines. The expansion of the buyer base, the surge in wellness-driven categories, and the renewed energy from both legacy and emerging brands signal a shift in how consumers think about caring for horses. As channels evolve and new players step forward, the Horse space is becoming a frontier of innovation, loyalty, and long-term opportunity.”



Andrea Binder
Vice President,
Pet Industry
Thought Leader

Horse is on the rise in the industry:

- Horse Care brand Farnam released a new brand vision in April 2025. “With a refreshed identity, updated loyalty program, and expanded community partnerships, Farnam sets the stage for the future of horse care.”⁴
- Chewy acquires SmartEquine (formerly SmartPak) in October 2025 to position them as a leader in the equine category and accelerates the company’s expansion into higher-margin health and wellness verticals⁵



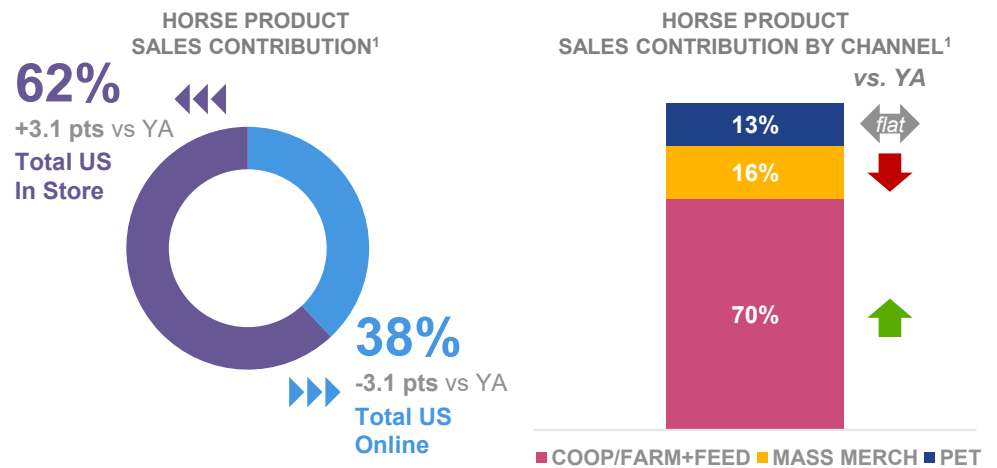
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Implications for the Pet Care Industry

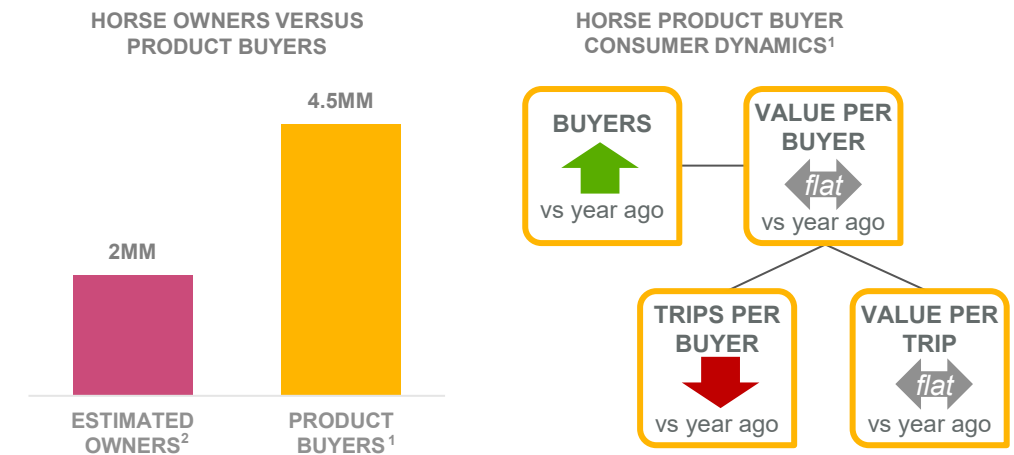
Opposite of Pet Care, In-Store Leads the Growth for Horse

In-store purchasing continues to be the primary driver of Horse Product sales, while online’s share has eased slightly from last year. Within the channel mix, Coop/Farm and Feed stores remain the clear leader and continue to grow share of sales.



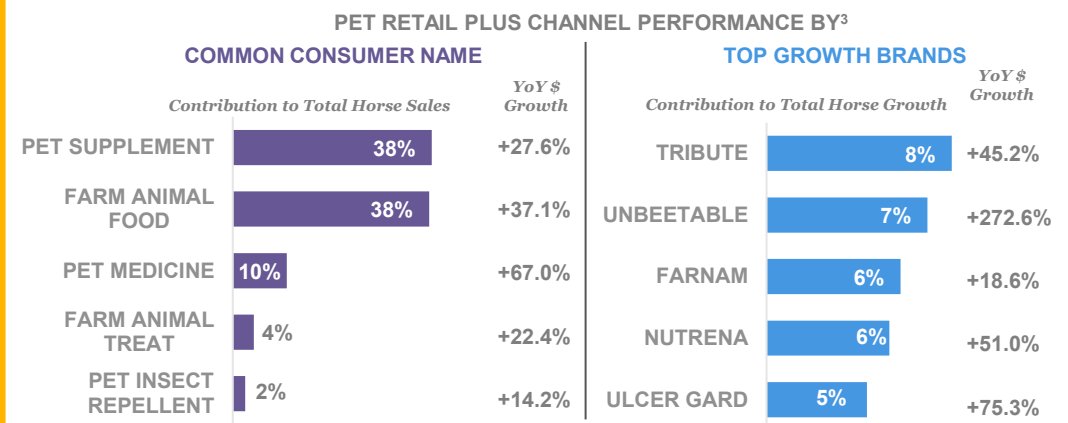
The Audience for Horse Buying Continues to Rise

Far more people purchase horse products than actually own horses. Buyer counts have risen dramatically in the last year, driving the category’s growth, as shopping occasions have declined slightly and spend has remained relatively stable.



Despite Share Shifts, Pet & Mass Still Have Momentum in Horse

Although Mass and Pet channels are losing share to Farm and Feed, there are still many areas of growth within the Horse space for those channels: Supplements and Food each represent major sales pillars with strong YoY gains and Pet Medicine is surging the fastest.



Source:
1 NielsenIQ Omniscience, Panel On-Demand Omnishopper, US Exp Osh - NDH Synd Full View - 444 5 yr | Entire Dataset, Latest 52 Weeks Ending 1/24/20265
2 APFA State of the Industry, 2025 National Pet Owners Survey
3 NielsenIQ Retail Measurement, US NIQ Total Store - 444 - Weekly (Synd), Total US Pet Retail Plus, Latest 52 Weeks Ending 02/21/2026, NIQ Target Animal: Horse
4 https://www.businesswire.com/news/home/20250402197190/en/Horse-Care-Brand-Farnam-Unveils-Bold-New-Brand-Vision-Reinforcing-Its-Leadership-in-Equine-Care-for-the-Next-Generation
5 https://investor.chewy.com/news-and-events/news/news-details/2025/Chewy-to-Acquire-SmartEquine-Expanding-Leadership-in-the-Equine-Health-Category/default.aspx