

Pet Nutraceuticals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Pet Nutraceuticals Market size is estimated at USD 5.46 billion in 2024, and is expected to reach USD 7.73 billion by 2029, growing at a CAGR of 7.20% during the forecast period (2024-2029).

Dogs dominate the market due to the wider spread of health issues such as joint problems, skin allergies, and digestive issues

- Pet nutraceuticals provide nutritional and therapeutic benefits to pets, which are derived from food sources that provide health benefits beyond basic nutrition. These products are available in various forms, such as supplements, chews, powders, and liquids. Pet nutraceuticals accounted for 2.9% of the global pet food market in 2022. The lower share of nutraceuticals was because of their higher cost and lack of awareness about the usage and handling of nutraceuticals.
- Dogs held the major share of the global pet nutraceuticals market, which accounted for USD 2.7 billion in 2022. The higher share of dogs in the pet nutraceuticals market was associated with their higher population in 2022, which was 39% of the pet population. Dogs suffer from a wider range of health issues, such as joint problems, skin allergies, and digestive issues, which has led to increased demand for nutraceuticals. The pet nutraceuticals market of dogs increased by 19.7% between 2017 and 2021.
- Cats are also one of the largest pet segments in the market, amounting to USD 1.4 billion in 2022. They are one of the largest pets adopted globally, accounting for 26% of the pet population in 2022. The growing number of pet owners who are seeking ways to improve the health and well-being of their cats using nutraceutical products is estimated to drive the nutraceutical market for cats at a CAGR of 6.7% during the forecast period.
- Other pets accounted for 12.3% of the global pet nutraceuticals market in 2022 because they support the growth, energy production, and well-being of these animals.
- The increasing pet population and rising pet health concerns are factors anticipated to drive the pet nutraceuticals market at a

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CAGR of 6.1% during the forecast period.

North America held a dominant market share due to the higher awareness among pet owners about the importance of preventive healthcare

- Pet nutraceuticals are additional nutritional supplements given to pets to supply essential nutrients required for pets that are not available through the consumption of regular food. The nutraceuticals market accounted for 2.9% of the global pet food market in 2022. The limited share of pet nutraceuticals was because of their higher price and limited awareness among pet parents concerning their handling and feeding requirements.
- In 2022, North America held a significant share of the pet nutraceuticals market, accounting for USD 2.1 billion. The higher share was because of the pet population, which was 22.2% of the global pet population in the same year, the higher awareness among pet owners about the importance of preventive healthcare, and their willingness to spend on nutraceuticals in the United States and Canada.
- Europe and Asia-Pacific were the major regions after North America in the global pet nutraceuticals market, accounting for USD 1.5 billion and USD 862 million in 2022, respectively. Europe is a highly developed region in terms of the usage of pet supplements, where plant and animal-based supplements, such as insect-protein, soybeans, peas, and quinoa, are in high demand.
- However, the growing pet adoption and increasing disposable incomes of pet parents in Africa and Asia-Pacific are estimated to drive them to use premium supplements, making them the fastest-growing regions in the global pet nutraceuticals market, registering CAGRs of 11% and 8.7%, respectively, during the forecast period.
- The increasing pet health concerns, growing premiumization trend, and increasing awareness about nutraceuticals usage are projected to drive the global pet nutraceuticals market with a CAGR of 6.1% during the forecast period.

Global Pet Nutraceuticals Market Trends

Cats are the second largest adopted pets globally due to the growing adoption of cats as companions and increasing awareness about the benefits of owning a cat, driving the cat market

- Globally, cats are being less adopted as compared to dogs. In 2022, the cat population accounted for 24.8% of the global pet population, and it witnessed an increase in the population by 19.2% between 2017 and 2022. The share of cats is higher in Europe as cats are considered the symbol of luck or fortune, and also from historical times, particularly Russia has been a major country having a high population of cats as pets. The high growth of the cat population globally is because of the rise in pet humanization, the requirement for less space to live compared to dogs, and staying alone in a home for a longer time while no human is available to take care of the cat. For instance, between 2017 and 2022, more than 70% of pet parents, including cat parents in Russia and the United States, consider cats as family members, friends, or children.
- There was a significant increase in cat adoption during the pandemic as people had to stay indoors. Cats may also stay indoors without being cooped up and are silent animals compared to dogs. The United States witnessed higher adoption of cats as pets during the pandemic because of the work-from-home culture, leading to a demand for companionship and a higher number of pet owners being millennials. For instance, in 2022, millennials were 33% of pet parents in the United States. The higher adoption of cats during the pandemic is expected to have a positive impact for a longer period on the pet food market's growth. Factors such as an increase in the adoption and purchase of cats and an increase in pet humanization are expected to help the growth of the pet cat population. It is expected to help in the growth of the pet food market during the forecast period.

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The rise in premiumization and availability of a large number of pet products on various distribution channels contribute to the increase in pet expenditure globally

- There is a trend of increase in pet expenditure globally. Pet expenditure increased by 37.9% between 2017 and 2022 because of the rise in premiumization and growing health concerns. Dogs have a higher share of pet expenditure, accounting for 39.7% in 2022. This is due to the higher consumption of pet foods and being fed with premium pet foods.

- Pet parents invest the highest share of the pet expenditure for pet food as they are concerned about their pets' well-being. There has been a rise in providing other services such as pet grooming, pet daycare, and pet walking for better socialization with other pets and good-looking pets. This trend has been witnessed in regions such as North America, Europe, and Asia-Pacific. For instance, pet food accounted for 42.4% of pet expenses in the United States (USD 136.8 million) in 2022. People are purchasing premium pet food as they want their pets to consume high-quality food and are willing to pay premium prices. In the United States, about 40% of pet parents purchased premium pet food in 2022, and in Hong Kong's cat food market, the premium pet food segment accounted for 75% of the pet food sales in 2022.

- There is a change in purchasing pet nutraceuticals from offline stores to online stores, especially after the pandemic, because of the large number of pet products available on websites. However, there are countries such as the Netherlands where pet parents prefer purchasing from pet stores due to the quality of the products offered by them. For instance, in the United States, online pet care sales increased from 32% in 2020 to 40% in 2022. Premiumization and growing concerns about health are factors expected to contribute to the increase in pet expenditure during the forecast period.

Pet Nutraceuticals Industry Overview

The Pet Nutraceuticals Market is moderately consolidated, with the top five companies occupying 42.36%. The major players in this market are ADM, Alltech, Mars Incorporated, Nestle (Purina) and Vetoquinol (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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