

Pet Care - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Pet Care Market Analysis

The pet care market size reached USD 380 billion in 2025 and is projected to climb to USD 650 billion by 2030, advancing at an 11.33% CAGR. Dogs remain the dominant companion animal, and owners continue to channel household budgets toward premium nutrition, health care, and technology-enabled services. Younger demographics led by Millennials and Gen Z are accelerating spend per pet, while the rapid uptake of online subscriptions and direct-to-consumer platforms is expanding product reach. Rising urbanization in Asia-Pacific is adding fresh demand layers, and functional nutrition backed by deeper science is reinforcing pricing power. At the same time, cost inflation, regulatory changes, and ingredient-sourcing pressure test manufacturers' agility and margin discipline.

Global Pet Care Market Trends and Insights

Rising Global Pet Ownership among Millennials and Gen Z

Gen Z households owning pets jumped 43.5% from 2023 to 2024, reaching 18.8 million US households. Nearly all of these owners consider the animal a family member, and they regularly reprioritize discretionary spending to protect pet budgets. Similar patterns appear in China, where the urban pet population topped 120 million in 2024. Physical retailers note the shift, Gen Z store visits at PetSmart rose 1.3% over five years, while Millennial traffic dipped, signaling a fresh cohort with distinct channel preferences. Over the medium term, sustained cohort replacement is anticipated to lock in elevated demand.

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Humanization of Pets Driving Premium Spend

In the United States, premium dog food already accounts for 30% of category sales, and owners pay up to USD 150 monthly for human-grade formulations. Fresh food has shown more than 30% annual growth since 2019 and now delivers 31.7% of premium sales. Supplements and pet insurance uptake underscore willingness to invest in preventive health, with dog insurance penetration reaching 45% in 2024, as brands position products as functional wellness rather than basic nutrition, the margin headroom increases.

Inflation-Driven Price Sensitivity for Premium SKUs

Fifty-eight percent of owners believe pet items have risen faster in price than other categories, and the median monthly dog ownership cost increased to USD 260 in 2024. Private-label share has reached 34% in Europe's USD 11.7 billion retail pet food market as households seek savings. Despite the pullback, many owners preserve core nutrition spend by reducing outlays elsewhere, mitigating volume risk for essential products.

Other drivers and restraints analyzed in the detailed report include:

E-commerce and Direct-to-Consumer Subscriptions Are Expanding Access / Advances in Nutrition Science Enabling Functional and Personalized Diets / Stringent Product-Safety Regulations Raising Compliance Costs /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Dogs accounted for 59% of the pet care market share in 2024, reflecting wider product portfolios and higher spending per animal. Cats are projected to log a 7.8% CAGR through 2030, propelled by urban living and feline-specific innovation. The dog segment benefits from advanced health formulations, with premium dog food making up 30% of category sales. Cats are experiencing a "cat economy" surge in China as apartments favor smaller pets. Continued humanization keeps premium canine diets at the forefront of new launches. Meanwhile, cat-oriented snack and functional treat rollouts aim to close the historical spending gap. The rising count of single-person households worldwide further underpins cat adoption and associated accessory sales.

Pet food represented 40.5% of the pet care market size in 2024, validating its foundational status in household budgets. Fresh and refrigerated formulations are expanding at a 19.5% CAGR, supported by consumer demand for minimally processed fare. The wider portfolio includes healthcare items, grooming, accessories, and services, each capturing share as owners duplicate human lifestyle purchases for animals. Subscription revenue models are reshaping replenishment frequency, especially in wet and fresh food. Smart feeders and connected water fountains integrate seamlessly with these premium menu options, bolstering ecosystem stickiness.

The Pet Care Market Report is Segmented by Pet Type (Dog, Cat, Fish, and More), by Product Type (Pet Food, Pet Healthcare, Grooming and Hygiene, and More), by Distribution Channel (Offline Retail Stores, Online Retail Stores, and Subscription Platforms), by Price Tier (Mass, Premium, and Super-Premium), and by Geography (North America, Europe, Asia-Pacific, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America commanded a 42.5% revenue share of the pet care market in 2024. Mature premium positioning, high outpatient

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veterinary spending, and industry-leading e-commerce penetration sustain growth despite market maturity. Asia-Pacific contributes strong incremental volume as urban households in China, India, and Southeast Asia embrace companion animals. The region's 12% forecast CAGR exceeds every other geography, supported by income rises and digital commerce leapfrogging. Asia-Pacific is pacing at a 12% CAGR to 2030, buoyed by income gains and cultural shifts toward pet companionship. China's market value reached USD 41.9 billion in 2024, with food representing 52.8% of spend.

Europe maintains a balanced structure characterized by stringent safety standards and growing interest in alternative proteins. Sustainability narratives resonate, giving plant-based and insect-based innovations favorable traction under the EU's green transition policies.

South America, the Middle East, and Africa remain smaller in absolute revenue but yield double-digit growth potential. Supply-side challenges such as cold-chain infrastructure and price sensitivity necessitate localized product formats. Nonetheless, middle-class expansion in Brazil, Mexico, Saudi Arabia, and the UAE is opening space for mid-tier and premium offers, especially online, where physical distribution lags. Multinational brands mitigate logistics hurdles by partnering with regional co-packers and emphasizing ambient or freeze-dried formulations that bypass refrigeration needs. Growing smartphone penetration is accelerating direct-to-consumer deliveries, giving new entrants a cost-effective path to market without large brick-and-mortar footprints. Regulatory alignment within blocs like Mercosur and the Gulf Cooperation Council is gradually easing labeling and customs friction, although tariffs on specialty inputs still weigh on shelf prices. Companies that adapt pack sizes, flavor profiles, and promotional cadences to local spending patterns are already securing first-mover advantage while infrastructure continues to mature.

List of Companies Covered in this Report:

Mars Inc. / Nestle Purina / Hill's Pet Nutrition (Colgate-Palmolive) / General Mills Inc. / J.M. Smucker Co. / Freshpet Inc. / PetSmart Inc. (BC Partners) / Zoetis Inc. (Pfizer spin-off) / IDEXX Laboratories / PetIQ Inc. (Bansk Group) / Trupanion Inc. / Farmina Pet Foods / Supertails /

Additional Benefits:

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

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