Euromonitor International

Where Consumers Shop for Pet Care

November 2025

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Executive summary
In-store shopping is more common for pet care but online attracts with price

STATE OF THE INDUSTRY

Pet care starts to feel the heat of pricing pressures
Evolving pet demographics drive category realignment in global pet care
Cats take the lead in driving pet food category growth; smaller dogs support
Mature markets face volume pressures, while emerging Asia drives category expansion
Pet care omnichannel retailers benefiting from changing channel landscape

OFFLINE RETAIL

Pet shops and superstores continue to dominate pet care channels
Budgeteer pet parents drive discounter and warehouse club growth
Grocery and non-grocery channels contribute to equal sales value
Need for affordable options puts a spotlight on discounters and warehouse clubs
Multiple non-grocery channels diversify portfolio to include pet care products
Cobasi and Fressnapf drive pet shop and superstore channel development
Maxi Zoo omnichannel becoming one-stop shop by including a full range of pet services

RETAIL E-COMMERCE

Development of distribution network at the core of e-commerce expansion
Last-quarter sales boosted by cold weather gear and gifting trend
The Chinese online pet care market is becoming more prominent globally
Health-focused pet owners drive pet supplement sales via online retailers
Pet specialists continue to expand their online presence by learning from offline
Subscription-based orders at the core of Chewy’s dominant position
Personalised meals for dogs drives fast-paced growth of The Farmer’s Dog's business

CONCLUSION

Key findings
Increased channel penetration and personalisation creating value growth
Pet care market maturation dictates the need for curated products and experiences

APPENDIX

Euromonitor Passport E-Commerce: Coverage and methodology

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