



Euromonitor
International

Pet Care in the US

June 2026

Table of Contents

EXECUTIVE SUMMARY

2026 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Pet Care

INDUSTRY PERFORMANCE

Value Growth Outpaces Volume Amid Pricing Pressures and Polarised Consumer Behaviour

Dog Food Dominates Volumes, While Premiumisation Drives Dynamism for Cat Food

Brands Leveraging Premiumisation and Multifunctionality Capture Growth with Science-Backed Innovation

Chart 2 - The Honest Kitchen Launches Affordable Human Grade Clusters for Premium Quality Nutrition

Chart 3 - GumPaws Multifunctional Gummy Supplements

Chart 4 - Value Sales 2021-2031

Chart 5 - Volume Sales 2021-2031

Chart 6 - Value Sales by Category 2026

Chart 7 - Pet Populations 2021-2026

WHAT'S NEXT?

Pet Owners Likely to Embrace Premiumisation Amid Shifting Consumption Patterns

Brands Set to Invest in Digital Commerce and Personalised Nutrition to Capture Growth

Chart 8 - Analyst Insight for Pet Care

Innovation in Multifunctional Products and Partnerships to Drive Strategic Differentiation

Chart 9 - Forecast Value Sales 2021-2031

Chart 10 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Nestlé and Mars Defend Their Lead Amid Rising Presence of Competitors

Wellness Disruptors and Private Label Products Reshape Competitive Opportunities

Chart 11 - Company Shares 2025

Chart 12 - Brand Shares 2025

CHANNELS

Retail E-Commerce Reshapes Distribution with Rapid Growth and Channel Shifts

Disruptive Brands Expand Retail Reach through Specialised Partnerships and Innovation

Chart 13 - Retail Channels 2021-2026

PRODUCTS

Advanced Formulations Featuring Health, Multifunctionality, and Transparency

Breakthroughs in Targeted Nutrition and Care

Chart 14 - Royal Canin's Fresh Health Nutrition, a Life Stage Line for Targeted Wellness

Implications of the Latest Trends and Product Developments

ECONOMIC CONTEXT

Chart 15 - Economic Context for Pet Care

Chart 16 - Real Gdp Growth 2021-2031

Chart 17 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 18 - Consumer Context for Pet Care

Chart 19 - Population 2021-2031

Chart 20 - Consumer Expenditure 2021-2031

Chart 21 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

Cat Food in the US

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Cat Food Summary

KEY INDUSTRY TRENDS

Chart 22 - Key Industry Trends for Cat Food

INDUSTRY PERFORMANCE

Pricing Pressures Reshape Consumption and Format Preferences among Cat Owners

Dry Cat Food Dominates Volumes While Multifunctionality Drives Innovation and Growth in Cat Treats

Annamaet, Hill's and Nulo Lead Innovation with Multifunctional and Premium Formulations

Chart 23 - Hill's Launches Advanced Urinary and Hairball Control Formulae for Cats

Chart 24 - Nulo Expands Gently Cooked Meals for Cats with Fresh Style Recipes

Chart 25 - Value Sales 2021-2031

Chart 26 - Volume Sales 2021-2031

Chart 27 - Value Sales by Category 2026

WHAT'S NEXT?

Steady Volume Growth to Be Driven by Evolving Consumer Demographics and Premiumisation

Dry Cat Food Set to Maintain Dominance While Treats and Mixers Will Be the Fastest Growth Driver

Innovation in Multifunctionality and Transparency to Reshape Product Development and Consumer Loyalty

Chart 28 - Analyst Insight for Cat Food

Chart 29 - Forecast Value Sales 2021-2031

Chart 30 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Leading Manufacturers Leverage Diversified Portfolios to Sustain Combined Dominance

Incremental Niche Gains and Premiumisation Shape Growth Opportunities for Emerging Players

Chart 31 - Company Shares 2025

Chart 32 - Brand Shares 2025

CHANNELS

Retail E-Commerce Expands Its Lead through Premium Assortment and Autoship

Chart 33 - Retail Channels 2021-2026

PRODUCTS

Multifunctionality and Premiumisation Drive Product Innovation

Players Offer Targeted Health Benefits and Different Formats to Attract Cat Owners

Chart 34 - Annamaet Offers Weight Management Cat Food

Recent Trends Impact Business Strategies

ECONOMIC CONTEXT

Chart 35 - Economic Context for Cat Food

Chart 36 - Real Gdp Growth 2021-2031

Chart 37 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 38 - Consumer Context for Cat Food

Chart 39 - Population 2021-2031

Chart 40 - Consumer Expenditure 2021-2031

Chart 41 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

[Dog Food in the US](#)

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Dog Food Summary

KEY INDUSTRY TRENDS

Chart 42 - Key Industry Trends for Dog Food

INDUSTRY PERFORMANCE

Economic Pressures and Rising Disposable Incomes Shape Consumer Spending

Wet Dog Food Drives Value with Premiumisation, While Treats Gains Volume Momentum

Jinx and Instinct Innovate to Meet Premium and Fresh Demands

Chart 43 - Jinx Premium Dog Treats with Clean Ingredients and Functional Benefits

Chart 44 - Instinct Launches Fresh/Raw Meals to Meet Demand for Minimally Processed Food

Chart 45 - Value Sales 2021-2031

Chart 46 - Volume Sales 2021-2031

Chart 47 - Value Sales by Category 2026

WHAT'S NEXT?

Premiumisation and Economic Pressures to Shape Moderate Growth Amid Price Sensitivity

Chart 48 - Analyst Insight for Dog Food

Dry Dog Food Expected to Remain Dominant but Wet Food Will See Dynamic Growth

Manufacturers Adopt Value Clarity and Multifunctionality to Address Cost Pressures

Chart 49 - Forecast Value Sales 2021-2031

Chart 50 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Leading Manufacturers Face Share Erosion Amid Rising Private Label Presence

Innovative Launches Reshape the Competitive Dynamics

Competitive Landscape Influenced by Strategic Acquisitions

Chart 51 - Company Shares 2025

Chart 52 - Brand Shares 2025

CHANNELS

Retail E-Commerce Leads Growth as Traditional Grocery Channels Decline

Emerging Retail Models and Premiumisation Shape Channel Competition

Chart 53 - Retail Channels 2021-2026

PRODUCTS

Demand for Functional Health Benefits and Fresh, Minimally Processed Dog Food Drives Innovation

Product Innovations From Chewy and Goodgut Follow the Latest Trends

Chart 54 - Chewy Expands E-commerce Influence with Launch of Get Real Fresh Dog Food

Polarisation and Rise of Independent Brands Impact the Competition

ECONOMIC CONTEXT

Chart 55 - Economic Context for Dog Food

Chart 56 - Real Gdp Growth 2021-2031

Chart 57 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 58 - Consumer Context for Dog Food

Chart 59 - Population 2021-2031

Chart 60 - Consumer Expenditure 2021-2031

Chart 61 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

[Other Pet Food in the US](#)

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Other Pet Food Summary

KEY INDUSTRY TRENDS

Chart 62 - Key Industry Trends for Other Pet Food

INDUSTRY PERFORMANCE

Economic Challenges and Consumer Shifts Create Volume Moderation Amid Premium Growth

Bird Food Dominates Volumes, While Fish Food Shows Steady Growth

Laroy Group'S Cédé Multifunctional Egg Food Line Enhances Bird Nutrition and Market Appeal

Chart 63 - Cédé Elevates Bird Nutrition with Multifunctional Line

Chart 64 - Value Sales 2021-2031

Chart 65 - Volume Sales 2021-2031

Chart 66 - Value Sales by Category 2026

WHAT'S NEXT?

Price-Driven Growth Expected to Continue to Contrast with Volume Decline

Chart 67 - Analyst Insight for Other Pet Food

Bird Food to Retain Volume Leadership While Fish Food Will Lead Value Growth

Premium Fresh Diets and Economic Pressures to Reshape Product Innovation and Channels

Chart 68 - Forecast Value Sales 2021-2031

Chart 69 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Changing Shares and Positions at the Top, and Rising Private Label Competition

Chart 70 - Company Shares 2025

Chart 71 - Brand Shares 2025

CHANNELS

Retail E-Commerce Leads Distribution, and Sales and Share Growth Continues

Chart 72 - Retail Channels 2021-2026

PRODUCTS

Multifunctionality and Premiumisation Important in Product Innovation

A Focus on Health and Nutritional Efficiency

Chart 73 - Mazuri Introduces Premium Koi Pond Nuggets for Enhanced Pond Fish Nutrition

Business Dynamics Shaped by Move to Premium Products

ECONOMIC CONTEXT

Chart 74 - Economic Context for Other Pet Food

Chart 75 - Real Gdp Growth 2021-2031

Chart 76 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 77 - Consumer Context for Other Pet Food

Chart 78 - Population 2021-2031

Chart 79 - Consumer Expenditure 2021-2031

Chart 80 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

[Pet Products in the US](#)

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Pet Products Summary

KEY INDUSTRY TRENDS

Chart 81 - Key Industry Trends for Pet Products

INDUSTRY PERFORMANCE

Steady Growth Amid Economic Pressures and Shifting Consumer Priorities

Other Pet Products Dominates Value Sales While Pet Healthcare Leads Growth

Brands Pioneer Premium, Science-Led Wellness Products

Chart 82 - Pet Honesty Launches Dual Texture Dental Bites with Oral Health Benefits

Chart 83 - Royal Canin Offers Premium Supplements for Pet Wellness

Chart 84 - Value Sales 2021-2031

Chart 85 - Value Sales by Category 2026

WHAT'S NEXT?

Millennials and Gen Z Expected to Drive Growth for Pet Products

Chart 86 - Analyst Insight for Pet Products

Pet Healthcare Anticipated to Lead Value Growth, While Other Pet Products Will Remain the Largest

Innovation Will Reshape the Competition and Require Players to Adapt

Chart 87 - Forecast Value Sales 2021-2031

Chart 88 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Nestlé Purina Reinforces Its Lead through Innovation Amid Moderate Concentration Shifts

Chart 89 - Company Shares 2025

Chart 90 - Brand Shares 2025

CHANNELS

Retail E-Commerce Extends Its Dominance Due to Product Mix and Convenience

Chart 91 - Retail Channels 2021-2026

PRODUCTS

New Product Development Focuses on Advanced Manufacturing and Multifunctionality

Recent Launches Highlight the Trends Towards Premiumisation and Multifunctionality

Chart 92 - Other Half Launches Doggie Dental, an Oral Health Postbiotic for Dogs

Commercial Implications of New Advanced Formulations

ECONOMIC CONTEXT

Chart 93 - Economic Context for Pet Products

Chart 94 - Real Gdp Growth 2021-2031

Chart 95 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 96 - Consumer Context for Pet Products

Chart 97 - Population 2021-2031

Chart 98 - Consumer Expenditure 2021-2031

Chart 99 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/pet-care-in-the-us/report.