



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

## 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.

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- **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.
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