

Pet Care in New Zealand

May 2025

Table of Contents

Pet Care in New Zealand

EXECUTIVE SUMMARY

Pet care in 2025: The big picture

2025 key trends

Competitive landscape

Retail developments

What next for pet care?

MARKET INDICATORS

Table 1 - Pet Populations 2020-2025

MARKET DATA

- Table 2 Sales of Pet Food by Category: Volume 2020-2025
- Table 3 Sales of Pet Care by Category: Value 2020-2025
- Table 4 Sales of Pet Food by Category: % Volume Growth 2020-2025
- Table 5 Sales of Pet Care by Category: % Value Growth 2020-2025
- Table 6 NBO Company Shares of Pet Food: % Value 2020-2024
- Table 7 LBN Brand Shares of Pet Food: % Value 2021-2024
- Table 8 NBO Company Shares of Dog and Cat Food: % Value 2020-2024
- Table 9 LBN Brand Shares of Dog and Cat Food: % Value 2021-2024
- Table 10 Penetration of Private Label in Pet Care by Category: % Value 2020-2025
- Table 11 Distribution of Pet Care by Format: % Value 2020-2025
- Table 12 Distribution of Pet Care by Format and Category: % Value 2025
- Table 13 Distribution of Dog and Cat Food by Format: % Value 2020-2025
- Table 14 Distribution of Dog and Cat Food by Format and Category: % Value 2025
- Table 15 Forecast Sales of Pet Food by Category: Volume 2025-2030
- Table 16 Forecast Sales of Pet Care by Category: Value 2025-2030
- Table 17 Forecast Sales of Pet Food by Category: % Volume Growth 2025-2030
- Table 18 Forecast Sales of Pet Care by Category: % Value Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cat Food in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Shifting consumer behaviour drives premiumisation and diversified product formats

Competitive dynamics shaped by Nestlé's aggressive expansion

Supermarkets dominate while e-commerce grows modestly

PROSPECTS AND OPPORTUNITIES

Health-focused innovation to underpin steady market expansion

Gradual e-commerce expansion complements supermarket dominance

Innovation driven by natural ingredients and functional diets

Summary 2 - Cat Food by Price Band 2025

CATEGORY INDICATORS

Table 19 - Cat Owning Households: % Analysis 2020-2025

Table 20 - Cat Population 2020-2025

Table 21 - Consumption of Cat Food by Prepared vs Non-prepared: % Analysis 2020-2025

CATEGORY DATA

- Table 22 Sales of Cat Food by Category: Volume 2020-2025
- Table 23 Sales of Cat Food by Category: Value 2020-2025
- Table 24 Sales of Cat Food by Category: % Volume Growth 2020-2025
- Table 25 Sales of Cat Food by Category: % Value Growth 2020-2025
- Table 26 Sales of Dry Cat Food by Life-Cycle: % Value 2020-2025
- Table 27 Sales of Wet Cat Food by Life-Cycle: % Value 2020-2025
- Table 28 NBO Company Shares of Cat Food: % Value 2020-2024
- Table 29 LBN Brand Shares of Cat Food: % Value 2021-2024
- Table 30 LBN Brand Shares of Cat Treats and Mixers: % Value 2021-2024
- Table 31 Distribution of Cat Food by Format: % Value 2020-2025
- Table 32 Forecast Sales of Cat Food by Category: Volume 2025-2030
- Table 33 Forecast Sales of Cat Food by Category: Value 2025-2030
- Table 34 Forecast Sales of Cat Food by Category: % Volume Growth 2025-2030
- Table 35 Forecast Sales of Cat Food by Category: % Value Growth 2025-2030

Dog Food in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation and supply shifts drive steady market growth

Competitive landscape shaped by premium positioning and wet food growth

Shift towards specialist channels and e-commerce diversification

PROSPECTS AND OPPORTUNITIES

Premiumisation and health-driven trends to support steady growth

E-commerce expansion to reshape shopping behaviour

Innovation focused on natural and personalised nutrition

Summary 3 - Dog Food by Price Band 2025

CATEGORY INDICATORS

- Table 36 Dog Owning Households: % Analysis 2020-2025
- Table 37 Dog Population 2020-2025
- Table 38 Consumption of Dog Food by Prepared vs Non-prepared: % Analysis 2020-2025

CATEGORY DATA

- Table 39 Sales of Dog Food by Category: Volume 2020-2025
- Table 40 Sales of Dog Food by Category: Value 2020-2025
- Table 41 Sales of Dog Food by Category: % Volume Growth 2020-2025
- Table 42 Sales of Dog Food by Category: % Value Growth 2020-2025
- Table 43 Sales of Dry Dog Food by Life-Cycle: % Value 2020-2025
- Table 44 Sales of Wet Dog Food by Life-Cycle: % Value 2020-2025
- Table 45 NBO Company Shares of Dog Food: % Value 2020-2024
- Table 46 LBN Brand Shares of Dog Food: % Value 2021-2024
- Table 47 LBN Brand Shares of Dog Treats and Mixers: % Value 2021-2024
- Table 48 Distribution of Dog Food by Format: % Value 2020-2025
- Table 49 Forecast Sales of Dog Food by Category: Volume 2025-2030
- Table 50 Forecast Sales of Dog Food by Category: Value 2025-2030
- Table 51 Forecast Sales of Dog Food by Category: % Volume Growth 2025-2030
- Table 52 Forecast Sales of Dog Food by Category: % Value Growth 2025-2030

Other Pet Food in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth remains subdued amid niche market limitations

Masterpet retains leadership, supported by Vitapet's strong supermarket presence

Supermarkets dominate distribution, driven by convenience and affordability

PROSPECTS AND OPPORTUNITIES

Small mammals present modest growth opportunities

E-commerce growth remains steady but constrained

Innovation remains modest but aligns with broader pet industry trends

CATEGORY INDICATORS

Table 53 - Other Pet Population 2020-2025

CATEGORY DATA

Table 54 - Sales of Other Pet Food by Category: Volume 2020-2025

Table 55 - Sales of Other Pet Food by Category: Value 2020-2025

Table 56 - Sales of Other Pet Food by Category: % Volume Growth 2020-2025

Table 57 - Sales of Other Pet Food by Category: % Value Growth 2020-2025

Table 58 - LBN Brand Shares of Bird Food: % Value 2021-2024

Table 59 - LBN Brand Shares of Fish Food: % Value 2021-2024

Table 60 - LBN Brand Shares of Small Mammal/Reptile Food: % Value 2021-2024

Table 61 - Distribution of Other Pet Food by Format: % Value 2020-2025

Table 62 - Forecast Sales of Other Pet Food by Category: Volume 2025-2030

Table 63 - Forecast Sales of Other Pet Food by Category: Value 2025-2030

Table 64 - Forecast Sales of Other Pet Food by Category: % Volume Growth 2025-2030

Table 65 - Forecast Sales of Other Pet Food by Category: % Value Growth 2025-2030

Pet Products in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Pet healthcare drives value growth in a maturing market

Masterpet maintains leadership across multiple segments

Distribution shifts towards specialisation and e-commerce expansion

PROSPECTS AND OPPORTUNITIES

Health and wellness to underpin steady market growth

E-commerce growth shaped by category-specific dynamics

Innovation fuelled by regulatory shifts and premiumisation

CATEGORY DATA

Table 66 - Sales of Pet Products by Category: Value 2020-2025

Table 67 - Sales of Pet Products by Category: % Value Growth 2020-2025

Table 68 - Sales of Pet Healthcare by Type: % Value 2020-2025

Table 69 - Sales of Other Pet Products by Type: % Value 2020-2025

Table 70 - NBO Company Shares of Pet Products: % Value 2020-2024

Table 71 - LBN Brand Shares of Pet Products: % Value 2021-2024

Table 72 - Distribution of Pet Products by Format: % Value 2020-2025

Table 73 - Forecast Sales of Pet Products by Category: Value 2025-2030

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-new-zealand/report.