



Euromonitor  
International

# Where Consumers Shop for Pet Care

March 2025

Table of Contents

## INTRODUCTION

Scope

Key findings (1)

## INDUSTRY SNAPSHOT

Industry remains strong despite tumultuous performance

Holistic wellbeing and the growing popularity of cats fuels growth across categories

Growth opportunities stronger in emerging markets

## CHANNEL SHIFTS

Pet care retail landscape continues to expand; e-commerce a clear winner

Retail offline retains dominance; APAC sees highest share of distribution from e-commerce

Shifts in retail infrastructure and shopper habits drive pet care retail e-commerce growth

## STORE-BASED CHANNELS

Pet specialists the single biggest retail offline channel

Grocery retail retains lead despite losing share to e-commerce

Case study: Target launches The Cuddle Collab – a limited-edition pet collection

Pet shops and superstores lead rapid growth in pet care retail offline

Leaders lag as they face headwinds on multiple fronts

Case study: Petbarn x Microsoft launch generative pet AI solution

Private label gains through pricing and portfolio expansion

Developed regions continue to dominate private label consumption

Continued availability and affordability enable private label growth

Case study: Zooplus launches new cat litter range with Febreze

## NON-STORE CHANNELS

Pet care retail e-commerce snapshot in 2024

E-commerce leads the way in non-store retailing

Digitalisation democratises distribution

Route to consumer: What is driving digital?

Direct-to-consumer brands benefit from trust, and are embracing other distribution channels

Case study: Ollie expands from direct-to-consumer-only to offline, and gains share

## FUTURE DEVELOPMENTS

Diverse distribution highways

Channels of the future: Quick commerce

Key findings (2)

## 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/where-consumers-shop-for-pet-care/report](http://www.euromonitor.com/where-consumers-shop-for-pet-care/report).