



ALDI



# Pet Care

OUR SELECTED TRENDS,  
INSIGHTS & OBSERVATIONS

free the birds®

crowsnest

TRENDS HORIZONS

Drop Scones (Apa ne)

825 Flour

1 Teaspoon Salt

1 Ki Card 1 Soda

1 Clean Tartar

1/2 an Egg

2 Teaspoons Soda

1/2 pt (Scant)

1 please C. of Tar

Sift Dry ingred

mix to smooth batter



# Welcome

**In a unique new era of the powerful pet industry, emotion meets innovation as we witness the humanisation of pet care.**

The sector is undergoing a profound transformation. One shaped by a deeper emotional connection between humans and their animal companions, and accelerated by rapid advances in science, technology, and design. Today, pets are more than beloved companions; they are family, confidants, and emotional anchors. This shift is driving a surge in demand for care that not only protects and nourishes, but also reflects the values, routines, and lifestyles of modern pet owners.

Owners are no longer content with the basics. They’re seeking solutions that mirror the care they give themselves, from personalised nutrition and emotional wellness support to beautifully designed living environments and tailored experiences.

The reason this momentum holds so much promise, is the parallel innovation happening in adjacent sectors.

The rise of scalp care, the hyper-personalisation of hair and skincare, the explosion of smart home technology, the longevity movement in health - all transformative industry movements which are shifting consumer expectations toward proactive, tailored, and design-led solutions. And it is no longer just for us humans.

As these categories redefine how we care for ourselves, they simultaneously unlock huge potential for brand and product development in pet care - especially within the fast-growing movement to treat pets with the same thoughtfulness, precision, and emotional investment we apply to human wellbeing.

The result is a market rich with opportunity - wellness-focused, emotionally attuned, and highly customised.

This isn’t simply a trend - it’s a cultural shift, and one that will continue to shape the future of pet care as owners look for products and experiences that honour the bond they share with their animals in ever more meaningful ways.

94 mn

94 million U.S. households own at least one pet, compared to 82 million in 2023.  
*APPA, 2025*

38%

38% welcomed a new pet into 10.9 million homes over the last four years.  
*UK Pet Food, 2024*

72%

72% of dog owners and 70% of cat owners reported considering pets as part of their families.  
*Packaged Facts, 2025*

\$545 bn

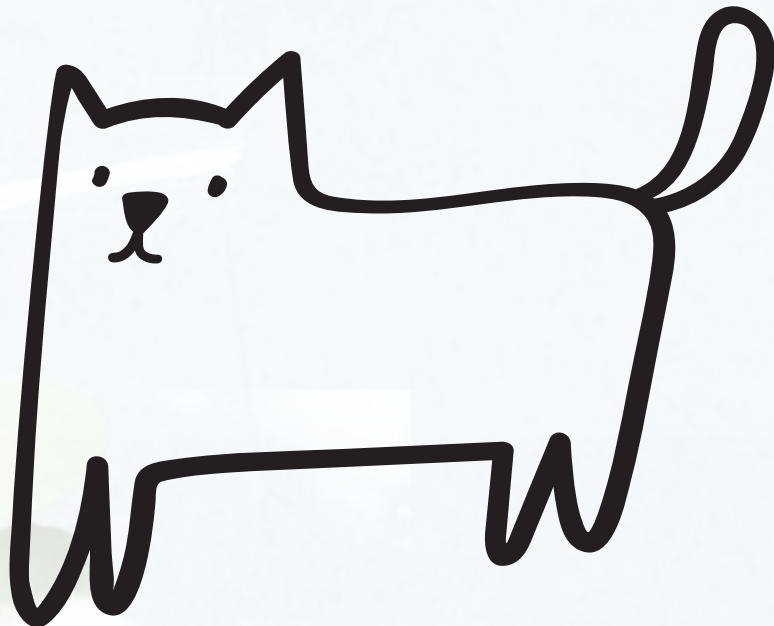
The Pet Care market value is expected to reach \$545.7 billion by 2032.  
*Global Market Insights, 2024*

70%

“Most (70%) agree that having pets is as much work as having kids - even people who have kids.”  
*Ipsos, 2025*

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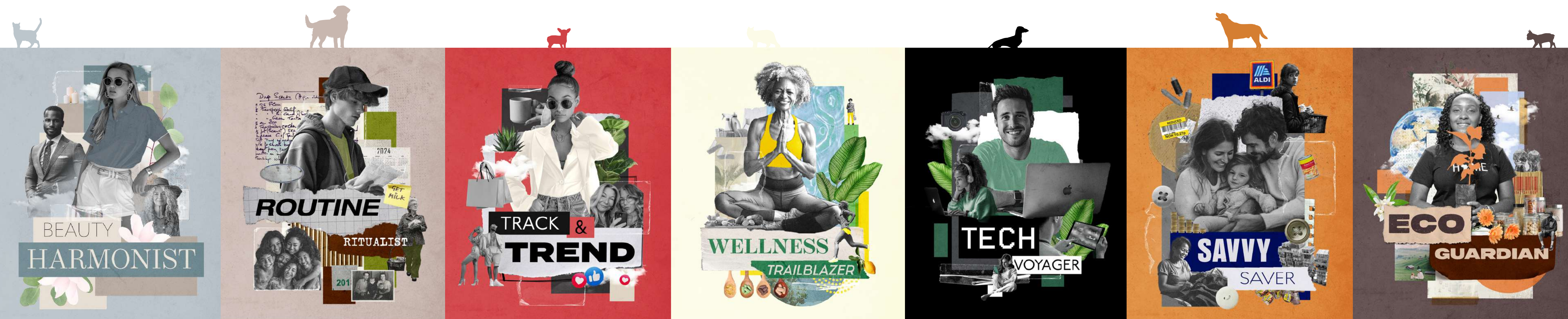
# Introducing the attitudes

Here at Free The Birds we don't believe your physical age defines you - or how you care for your furry friends. Whilst demographics will always have their place, we believe that brands and marketers are too quick to rely upon them. We believe in 'emographics'. The way you behave, the way you think, the way you view the world, says more about you than the number of candles on your birthday cake.

Age-related pigeon-holes are dangerous things to fall into if you're a marketer. There could be consumers who you aren't reaching simply because they were under or over an age limit - even though they potentially relate to your brand.

As a result, our trends insights are related to consumer attitudes not age. We believe that this perspective will prove to be more reflective of human nature and much more inspiring. It certainly is when we are briefing our creative teams. We find that designing and writing for an attitude produces a much stronger connection with the intended consumer.

So, we hope you enjoy seeing all the exciting and thought-provoking new ideas in petcare, seen in the context of a variety of consumer attitudes. We feel sure that some of those attitudes will be very familiar to you. And very valuable.



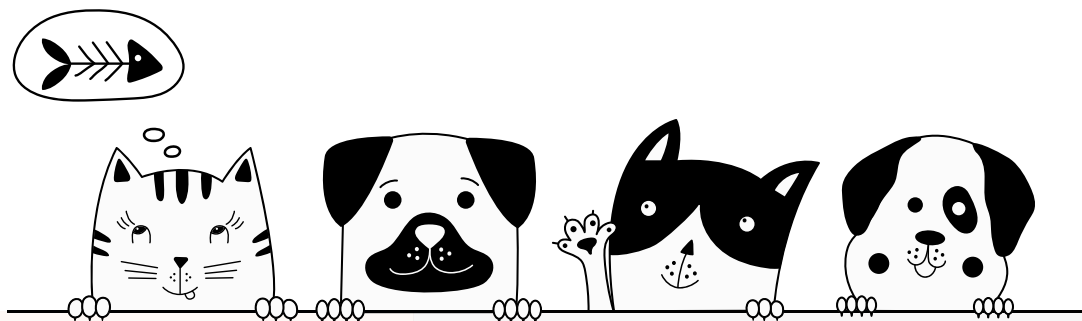
We have created seven consumer attitudes

**All equally relevant and tribes you could be targeting.**

You will find that you - and your consumers - identify strongly with a single attitude, but see elements of themselves in several of them, embodying traits across the archetypes.



# Introducing the attitudes



The **Beauty Harmonist** is one who seeks beauty within and out, seeking the highest quality in their purchases; highly efficacious ingredients housed within chic, elevated packaging.

The **Routine Ritualist** adheres strictly to their daily routines and habits. This includes purchasing products that align with their accustomed standards, and choices often born of habit and often inherited from their parents.

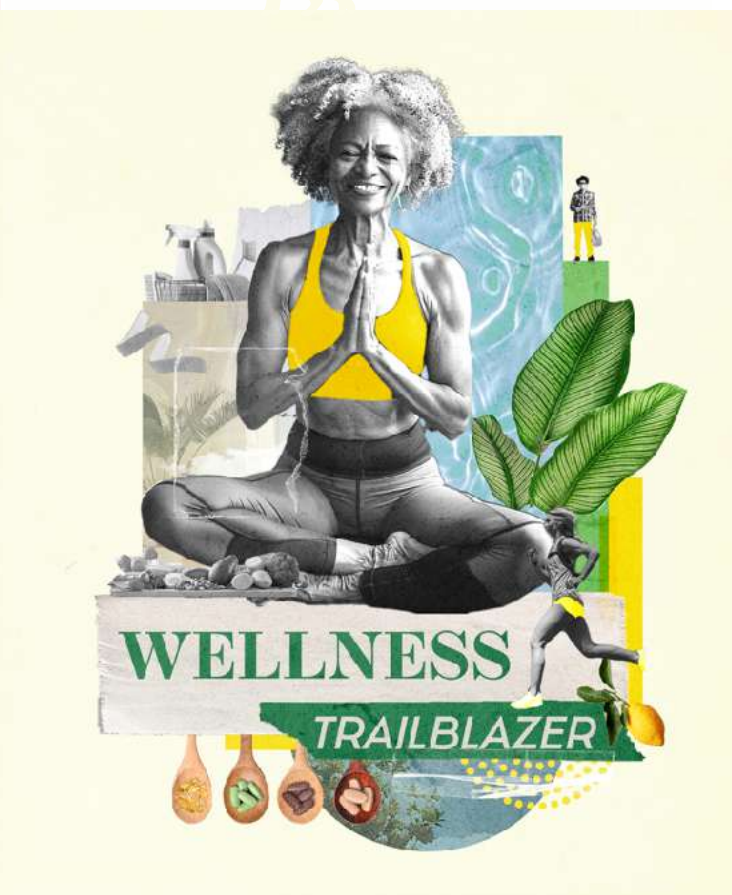
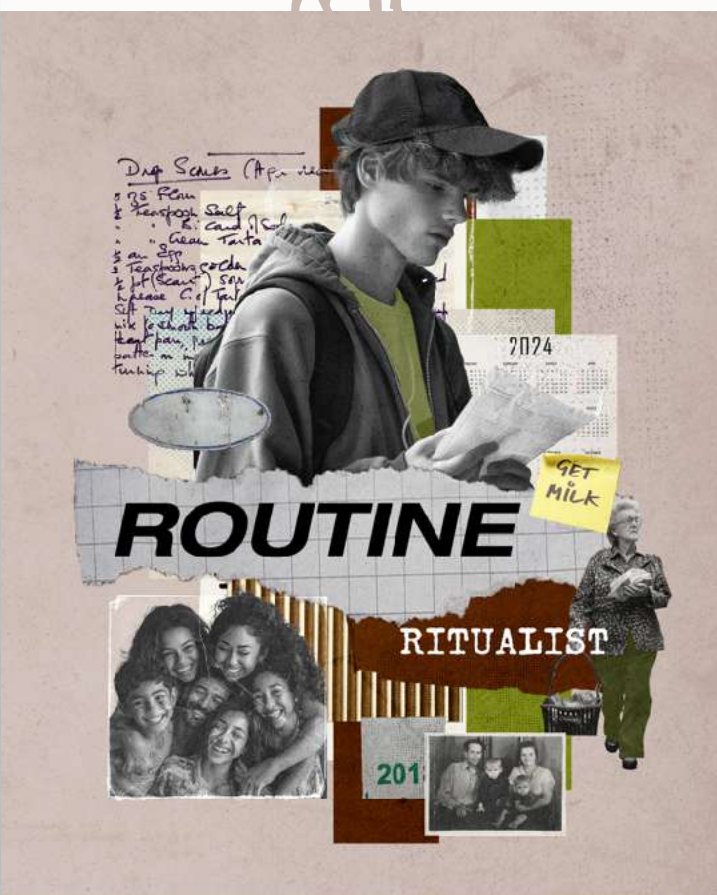
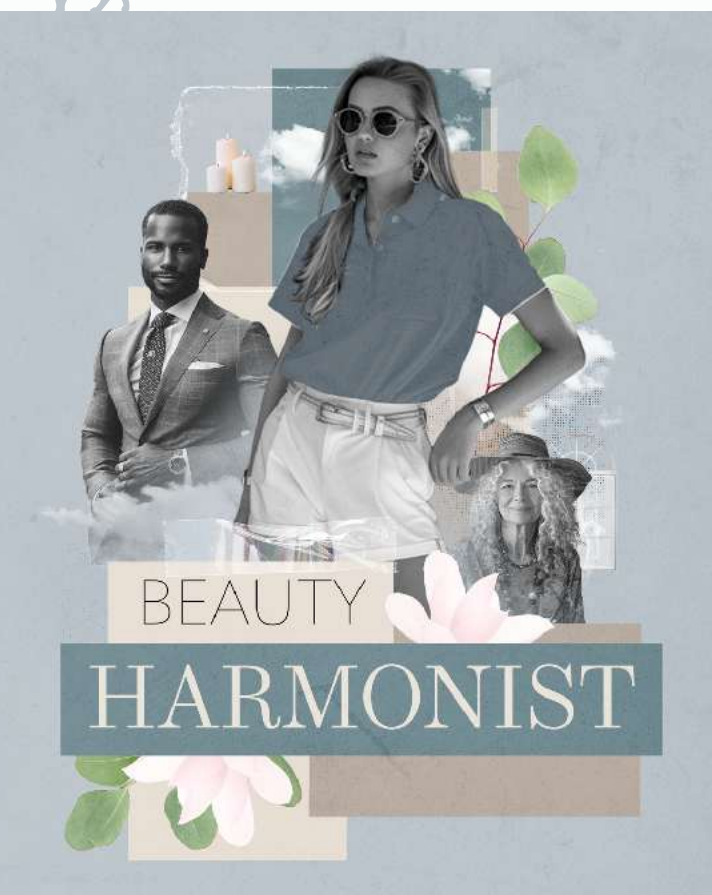
This pursuer of the popular, the **Track & Trend** diligently follows the latest trends in both household-name and independent, emerging products, believing that conformity to products which are in-demand is the best course of action.

The **Wellness Trailblazer** prioritises health and tranquility in every aspect of their care regimes. This includes products they choose for their own and their loved one's personal routines, promoting wellbeing alongside their primary functions.

On a consistent and committed journey through the realm of technology, the **Tech Voyager** explores advancements and innovations with dedication and enthusiasm in their everyday life.

Driven by a necessary desire to reduce unnecessary spending, the **Savvy Saver**'s purchasing decisions are based upon value for money, from the cheapest option available to capitalising on deals of the moment, or strategic purchases which save them money over time.

Dedicated to protecting and preserving the environment, the **Eco Guardian** actively seeks to safeguard our planet through a commitment to sustainability in daily choices and consumption habits.



BEAUTY  
HARMONIST

ROUTINE  
RITUALIST

TRACK  
& TREND

WELLNESS  
TRAILBLAZER

TECH  
VOYAGER

SAVVY  
SAVER

ECO  
GUARDIAN



# Nutrition, unleashed



\$158bn

“Revenue in the Pet Food market amounts to US\$158.42bn in 2025.”  
*Statista, 2025*

63bn kg

“In the Pet Food market, volume is expected to amount to 62.84bn kg by 2030.”  
*Statista, 2025*

52%

“52% reported using subscription-based purchasing...pet nutrition products are the most popular.”  
*American Pet Products Association, 2025*

53%

“Most pet owners reported giving equal (53.1%) priority to buying healthy food for their pets compared with themselves.”  
*National Library of Medicine, 2019*

**The future of pet food lies in our growing ability to understand the unique microbiomes of our pets, enabling man’s best friends to live longer, healthier lives. From lab-grown ingredients to AI-informed formulations, pet nutrition is becoming more personalised and precise than ever before.**

Thanks to advances in technology and machine learning, the outdated “one size fits all” approach is being replaced by more tailored nutrition plans. As we deepen our understanding of how factors like breed, size, and age affect a dog’s health and digestion, we’re able to move beyond generic feeding practices toward truly individualised care.

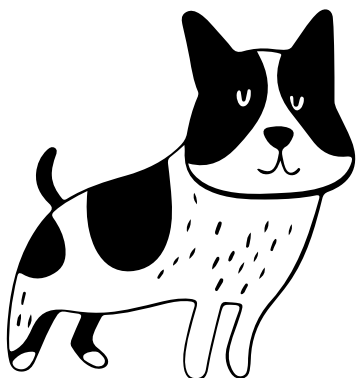
By factoring in a pet’s breed, weight, health conditions, genetics, and even daily activity, AI can now recommend diets that not only alleviate specific health concerns and manage allergens, but also optimise weight and macronutrient intake. This supports a better quality of life and greater longevity for our furry companions.

This new era of pet health is also driven by a wider industry shift toward human-grade ingredients and formulations. Lab-grown, cultivated meat is helping to meet the nutritional needs of pets while aligning with the ethical preferences of vegan and vegetarian owners,

providing high-quality, cruelty-free alternatives that don’t compromise on health. Preservation of this quality food is also being influenced by the growing trend of freeze-dried food, which has moved from supermarket sweets to dog treats.

Looking ahead, two major trends are set to define the evolution of pet nutrition. First, fresh, on-demand food subscriptions will give owners peace of mind that they’re feeding their pets the freshest, highest-quality meals. These platforms will also offer the flexibility to adjust meal plans based on what pets respond to best, essentially letting the animals “choose” what they want to eat.

Second, we’ll see a broader integration of functional ingredients designed to support longevity. The application of AI will support real-time updates on our pet’s health, and provide suggestions on new ingredients which can support issues that arise. A prime example here is a new Health Screening app from Ollie. This uses AI to analyse photos of your pet’s stool, teeth, skin, coat, and body size, to identify early signs of health issues like tartar, irritation, or weight problems.





Nutrition, unleashed...



W’Zis

W’ZIS? is redefining dog treats with a focus on advanced, plant-based nutrition tailored to modern pets’ needs. Free from meat and additives, its low-calorie, gut-friendly formulations align with growing demand for personalised pet wellness. Playfully irreverent in name, flavour and design, W’ZIS? combines science-led care with bold, sustainable packaging, proving that serious nutrition can still be fun.



Ollie

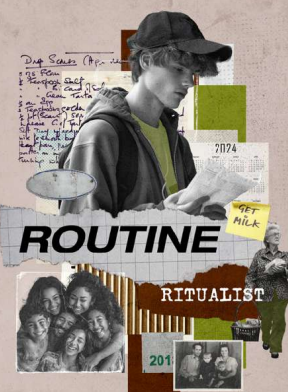
Ollie is revolutionising dog nutrition with personalised meal plans crafted from human-grade ingredients, tailored to each dog's unique needs. Developed with veterinary nutritionists, Ollie's recipes are slow-cooked to preserve nutrients and cater to various dietary requirements. Their sleek, minimalist packaging reflects a commitment to quality and transparency, aligning with the growing trend towards advanced, customised pet wellness.



The Pack x meatly

Meatly and plant-based pet food brand The Pack have launched the world’s first cultivated meat treat for dogs - a breakthrough in sustainable, science-led nutrition. By combining Meatly's pioneering lab-grown chicken with The Pack’s ethical pet food expertise, the partnership reflects a growing demand for innovative, climate-conscious alternatives that meet dogs’ nutritional needs without compromising on welfare, taste or performance.

Rooted in consistency and care, **Routine Ritualists** are embracing this trend through trusted formats that enhance their pet’s wellbeing. Rather than chasing novelty, they value tailored improvements, like functional ingredients or breed-specific formulas, that fit seamlessly into feeding habits.



Convenience-driven options such as auto-replenishing subscriptions and freeze-dried formats offer added reliability. As heritage brands adopt AI-driven insights and longevity-focused nutrition, Routine Ritualists play a key role in embedding these advances into the mainstream through steady, habitual use.

**The Wellness Trailblazer** is a key driver of this trend, seeking holistic, science-backed solutions that support their pet’s health with the same care they apply to their own. They’re drawn to personalised, nutrient-rich diets, clean ingredients, and innovation that nurtures longevity.



Brands can entice this consumer by offering sustainable, functional nutrition with transparent sourcing and wellness-focused benefits - framing pet food as an extension of mindful living and reinforcing the emotional bond between wellness, responsibility, and everyday care.

**Eco Guardians** are a powerful force behind this trend. They seek pet nutrition that minimises impact, such as lab-grown proteins, plant-based alternatives, and recyclable or compostable packaging. With high expectations of brands, they favour those that prioritise transparency, responsible sourcing, and long-term ecological health.



To win their trust, businesses must lead with genuine sustainability, offering pet food that not only nourishes animals, but also protects the planet they call home.



# Licks of vitality



\$2.4bn

“The pet supplements market size will grow from \$2.27 billion in 2024 to \$2.44 billion in 2025.”

*The Business Research Company, 2025*

62%

“62.4% of pet owners either agreed or strongly agreed they consider [VMS] important”, compared with 53.3% of non-pet owners.

*Euromonitor International, 2023*

1.1bn

“The Pet Probiotics Supplements Market is projected to expand from \$780 million in 2024 to \$1.1 billion by 2034.”

*Future Market Insights, 2024*

91%

“Searches for “dog probiotics” are up 91% over the last 5 years.”

*Exploding Topics, 2025*

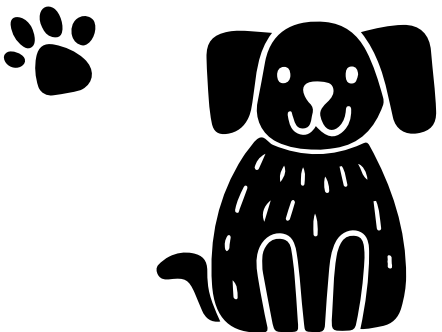
**An evolution of pet nutrition is the rapid rise of supplements, poised to become a dominant force in the market. Beyond serving high-quality food, we’re seeing a wider embrace of functional ingredients designed to support longevity, playing a key role in both the premiumisation of pet care and the continued humanisation of our animals.**

Just as we invest in our own health - exploring everything from digestion to joint care - we’re applying the same level of attention to our pets. The emotional bond has deepened, and pets are no longer simply companions. For many, they’re akin to children. Naturally, we want them to enjoy the longest, healthiest, and happiest lives possible. This convergence of personalised health awareness and emotional connection is fuelling a growing appetite for pet supplementation.

The first wave of this shift is already here, most notably in the surge of interest around probiotics. Championed for their benefits in gut health and overall wellbeing, these supplements support digestion and can also aid in managing allergies.

Looking ahead, the future of pet wellness lies in hyper-personalisation. Like human nutrition, this rapidly expanding category is being shaped by innovation - from DNA testing and AI-driven apps to smart wearable trackers. These tools unlock tailored solutions based on a pet’s specific needs, with efficacy that can be continuously tracked and refined.

Of course, the mainstream adoption of such services will take time. Economic pressures and the ongoing cost of living crisis continue to pose challenges for many pet owners. But as awareness grows and technologies become more accessible, personalised pet supplements are set to become a defining feature of the category. This shift will likely begin with free to low-cost apps that offer knowledge without pressure to spend - helping owners make informed decisions. And while some may see these products as a premium investment, many are beginning to recognise them as a form of preventative care - far less costly, in the long run, than repeated visits to the vet.





## Licks of vitality...



### Scrumpf

Scrumpf is leading the charge in elevated dog nutrition with natural, vet-approved supplements supporting canine wellness. Their targeted formulas - Calming, Joint Care, and Digestion - blend premium herbs and botanicals like lemon balm, oak bark, and fennel to address common health concerns holistically. Scrumpf stands out for its transparency, clean ingredients, and modern, minimalist ethos that treats dogs like the individuals they are.



### Zesty Paws

Zesty Paws is a US-made pet wellness brand focused on quality, fun, science-backed ingredients. Their cat mousses tap into the growing focus on pet nutrition, offering convenient, lickable supplements that double as toppers or treats. Options include Omega (skin & coat), Digestion (gut health), plus multivitamin, calming, immune and allergy blends - all in an innovative mousse format that makes daily wellness easy, tasty and mess-free.



### Delamour

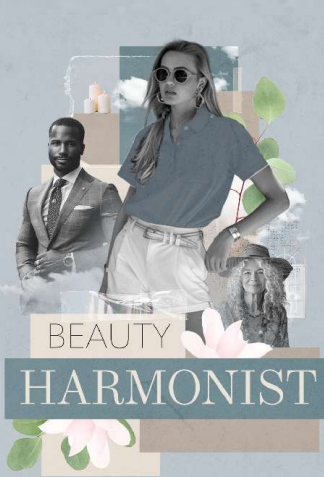
Delamour brings a gourmet touch to canine care with *The Soft One*, a range of soft-baked bites handmade in France by a master pâtissier. Developed with vets, each recipe - Vitality, Skin & Coat, Serenity, Oral Hygiene, Immunity - features high-grade actives like salmon oil, spirulina, and collagen. With a focus on craftsmanship, traceability, and ingredient integrity, Delamour blends French finesse with everyday functionality.

**Wellness Trailblazers** are reshaping the pet supplement space through their commitment to proactive, holistic health. Viewing animals as part of the family, they naturally extend their longevity-focused lifestyle into tailored, science-led supplementation. They seek high-quality, functional ingredients like probiotics and adaptogens that nurture long-term wellbeing.



Connect with this audience through transparency, evidence-based solutions, and accessible tech such as health-tracking apps. Knowledge, personalisation, and emotional reassurance are key.

For the **Beauty Harmonist**, pet supplements represent an elegant extension of their wellness philosophy, where inner health and outer vitality go hand in hand. They are naturally drawn to beautifully presented, functional products that promote radiance, balance, and longevity from within, inspired by their own rituals of self-care.



To resonate, brands should combine efficacy with elevated aesthetics, offering curated, design-conscious solutions that feel as considered as the rest of their lifestyle.

**Track & Trends** engage with this sector through social validation and visible results. Platforms like TikTok and Instagram serve as powerful discovery tools, where creators document daily routines and share real-time impact of supplements on their pets' mood, digestion, or coat condition.



This group values immediacy and relatability over clinical depth, but is savvy enough to spot what *appears* to work. Win their attention through influencer partnerships, compelling before-and-afters, and social storytelling that positions supplements as both effective and essential.



# The calm companion



72.5%

72.5% of dogs demonstrate a kind of highly problematic behaviour problem and anxieties.  
*National Library of Medicine, 2020*

90%

90% of owners “wouldn’t be able to identify some crucial signs of stress in a dog”  
*The Kennel Club, 2023*

\$31bn

“The global pet calming products market size is calculated at \$18.43 bn...and is forecasted to reach around \$31.78 bn by 2034.”  
*Precedence Research, 2025*

42%

“42% have observed a change in their pet's mental health and behaviour in the past 2 years.”  
*PetMeds, 2023*

**As probiotics grow in popularity, so too does recognition of their role in supporting mental health. This benefit is well-established in humans, and as we continue to shape the future of humanised pet care, we’re also deepening our understanding of how nuanced nutrition can support our pets’ emotional wellbeing.**

And it’s difficult not to address the humanisation of pets without championing how pet owners are seeking to support their pets’ mental health more than ever before. And brands are delivering.

Alongside support for gut health, research shows that healthy neurotransmitter production and function can help our pets to overcome conditions such as anxiety disorders. In developing a better understanding of the causes of pets’ anxieties and behavioural problems, we expand the treatment options available, from nutrition and supplementation to behavioural modification techniques and training.

Looking ahead, the future of pet wellness lies in the convergence of scientific rigour and holistic, plant-based approaches. Studies suggest that nutrients such as L-tryptophan, L-theanine and omega-3 fatty acids can positively influence mood-regulating neurotransmitters and reduce stress-linked inflammation in dogs.

Coupled with antioxidants and microbiome support, these ingredients lay the foundation for more emotionally resilient pets. And of course, the phenomenon that is CBD is seeping into pet care.

As our understanding deepens, so too does our commitment to personalised solutions. Pet wellness is moving towards bespoke care that mirrors human models; DNA-driven diets, precision supplements, even stress-monitoring wearables supported by AI and technology which can analyse different barks to detect anxiety or shifts in behaviour.

It's not just about calming treats or enrichment toys, but a complete shift in how we think about mental wellbeing in pets.

In short, we’re no longer just treating symptoms. We’re learning to listen to pets’ unspoken needs. And we’re responding with care that is as nuanced, natural and scientifically sound as our own.





# The calm companion...



## Scrumbles Crunchies

Scrumbles is a UK-based, family-run pet food brand rooted in gut-friendly, natural recipes enhanced with pre- and probiotics. Their Krunchies Calming Cat Treats spotlight the rising trend in pet mental-health support, blending soothing botanicals (valerian, chamomile) with gut-supporting ingredients in a crispy-soft bite. With 5× more chicken, gluten-free, low-calorie, and eco-packaged, these treats offer a tasty, natural way to ease feline stress.



## L'floof

L'floof's SNOOZE candle offers a soothing aromatherapy experience, gently diffusing cedarwood, lavender, geranium, and pine-needle essential oils in 100% soy wax. Designed for anxious dogs, its forest-inspired fragrance promotes relaxation and reduces stress, ideal during storms or separation. Artisan-crafted in the UK, this elegant home accessory doubles as a wellness aid, blending style with canine calm.

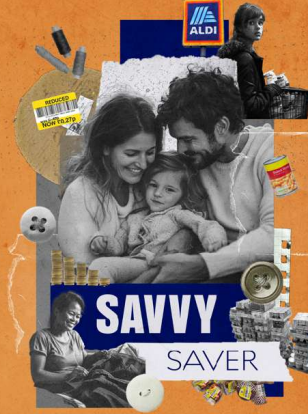


## Dognition

This unique assessment app uses 20 science-based games to map your dog's cognitive traits - empathy, memory, reasoning, communication, and cunning - revealing how they perceive the world. By unpacking how your dog thinks and processes emotions, it enables tailored enrichment tools that reduce boredom, frustration, and anxiety - boosting mental well-being. Developed by canine cognition experts, it transforms mental stimulation into a compassionate wellness strategy.



**Savvy Savers** are approaching emotional wellbeing in pet care with practicality and purpose, seeking affordable ways to support their pets' mental health without overspending. Rather than premium positioning, they're open to proven, multi-functional products - such as probiotics that aid both digestion and anxiety relief - offering greater value per use.



They turn to trusted reviews, creator-led comparisons, and deals on proven supplements. Connect by spotlighting cost-effective, efficacious solutions and bundling emotional and physical wellness into accessible, results-driven formats.

For a **Track & Trend**, the rise of pet mental wellness is an exciting and highly shareable evolution of care. Social platforms are key touchpoints, where influencers share calming routines, mood-boosting supplements, and emotional transformation stories.



Products with visible, short-term results - like calmer behaviour or improved sleep - capture their interest. To appeal, brands should harness viral storytelling, influencer-led education, and aesthetic, "TikTok-famous" formats that feel emotionally rewarding.

The **Wellness Trailblazer** sees their pet's emotional wellbeing not as an add-on, but integral to a balanced, well-rounded approach to care. Deeply attuned to mood, energy and behavioural shifts, they seek natural, scientifically credible solutions to support calm and resilience, favouring mood-regulating supplements, adaptogens, and rituals over reactive fixes.



They're drawn to brands that treat pets as sentient beings with emotional complexity, offering thoughtful, preventative care that mirrors the support and mindfulness they seek for themselves.



# The skinification of grooming



\$8bn

The pet grooming market size will grow from \$7.9 billion in 2025 to \$8.46 billion in 2025.

*The Business Research Company, 2025*

88%

88% of UK dog owners “believes their pooch deserves to be pampered just as much as humans do.”

*ManyPets, 2025*

41%

At-home grooming is the most prevalent form of grooming.

*Frontiers, 2022*

56%

56% of dog owners say that the cost of grooming is their main obstacle in using professional groomers.

*Frontiers, 2022*

**Few things better demonstrate the humanisation of our beloved furry friends than their growing dominance over our bathroom cabinets.**

As we care for the complexities of our own microbiomes, why wouldn't we do the same for our four-legged family members?

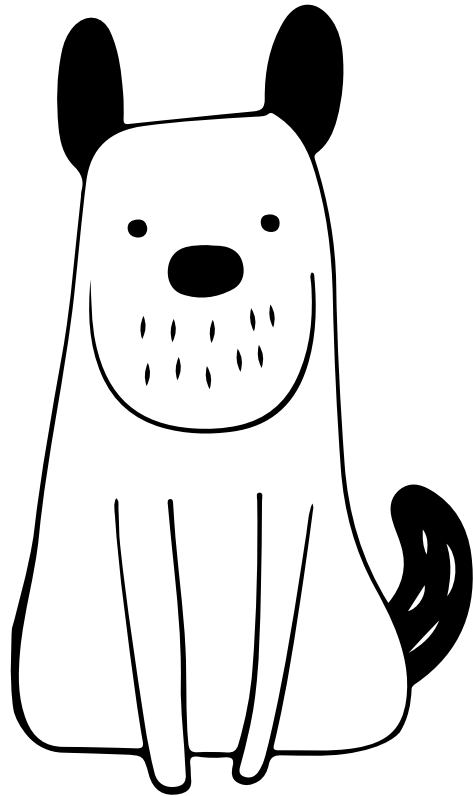
And brands are rising to the challenge. The grooming process is moving beyond the luxury groomers and pet salons. At-home solutions are helping customers to compete with professional groomers thanks to a burgeoning boom in dedicated tools to manage specific issues, from a more effective cleaning routine to tick removal.

Whether its the unfortunate scents they bring home from the outdoors, the colour and curl of their coat, or the allergens which irritate their skin, consumers now expect products that reflect every facet of both their pet's breed, and their personality.

Convenience culture is also influencing this movement, as customers seek products which help to stop dirt in its tracks. Products which support everyday cleaning and instant relief for pets at risk of allergens or a pH imbalance.

There is a growing trend in the use of dog wipes - an ideal on-the-go solution - and waterless solutions such as dry shampoos and no-rinse shampoos, which are excellent solutions for this issue.

Ultimately, this movement empowers pet parents to better understand specific needs, and demystifies how to meet them. From quick, on-the-go essentials to intuitive grooming tools that remove the need for professional intervention.





# The skinification of grooming...



## Mud

This playful dog wash brand celebrates the joy of mess. Its innovative brand identity is reactive by design, shifting and responding to mimic the unpredictable, tactile nature of mud. Packaging features interactive, animated elements and textured surfaces that engage both owners and pets. This bold, sensory approach sets Mud apart in a saturated category, turning everyday dog care into a creative experience.



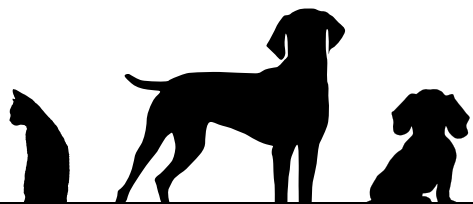
## Cleo & Hooman

Founded to care for a sensitive-skinned French Bulldog, Cleo & Hooman offers premium grooming products designed with vet-backed care. Their Zoomie Wipes are individually wrapped, hypoallergenic, and made with natural ingredients for gentle, on-the-go cleaning. As dog wipes become a growing trend in pet care, Zoomie Wipes stand out for combining convenience, skin-friendly formulations, and stylish, travel-ready design.

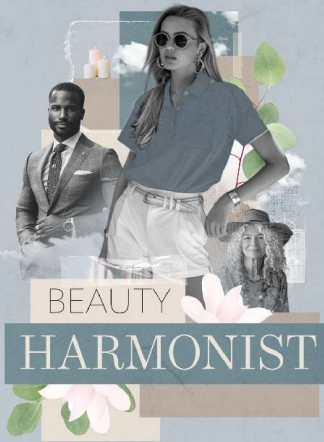


## Animology

Animology is a multi-award-winning UK pet care brand offering a comprehensive range of grooming products tailored to various canine needs. Their lineup includes shampoos for specific coat types and concerns, no-rinse sprays for quick clean-ups, and grooming accessories. Trusted by pet owners, vets, and groomers worldwide, Animology ensures every dog receives personalised care for a healthy, well-groomed appearance.



**Beauty Harmonists** are key drivers of the skinification of grooming trend, seeking pet care products that reflect the same standards they apply to their own routines - efficacious, design-led, and intentionally crafted. They favour elevated formulations and packaging that enhance both their pet’s wellbeing and their home aesthetic.



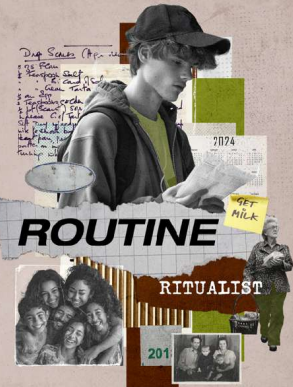
To capture this consumer, brands should offer skincare-inspired solutions with luxurious textures, elegant design, and tailored benefits, positioning pet care as an extension of self-care and everyday beauty for both pet and owner.

**Tech Voyagers** are drawn to innovative, high-performance pet care solutions that mirror their tech-driven lifestyle. They’re eager to explore smart tools, science-led formulations, and functional designs that enhance both pet wellbeing and user experience.



To engage this consumer, brands should spotlight cutting-edge ingredients, data-backed efficacy, and intelligent grooming tools - positioning pet care as an exciting frontier for innovation, and empowering Tech Voyagers to optimise their pets’ routines with the same curiosity they apply to their own.

**Routine Ritualists** are helping shape the skinification of grooming in quieter, more practical ways, favouring products that streamline and strengthen their established routines. Loyal to habit and heritage, they seek dependable, effective solutions that enhance consistency rather than disrupt it.



Here brands should offer subtle innovations from trusted names - such as multi-functional products or simplified formats - that reinforce reliability and ease. Products which optimise care without overhauling a routine is key to gaining trust and share.



# Future living, fur-inclusive



87%

“87%...said technology improves a person’s ability to care for a pet...79% would rely on tech to track their pet’s health and activities.”

*HostingAdvice.com, 2024*

\$23bn

The global pet tech market is estimated to be valued at \$9.28bn in 2025 and is expected to reach \$23.67bn by 2032.

*Coherent Market Insights, 2025*

80%

“80% of [survey] respondents said they would spend \$100 or more on tech to help monitor their pets.”

*HostingAdvice.com, 2024*

56%

Global smart-connected pet collars market is estimated to grow from \$505 million in 2025, to \$1,027 million in 2032.

*Metastat, 2025*

**No longer must pet owners settle for home additions that disrupt their aesthetic. Whether it’s litter trays, feeding bowls, or cleaning products, the integrated home of the future considers pets just as thoughtfully as any other family member. Today’s elevated essentials for animal care are exemplified by technology that makes looking after them cleaner, kinder, and more efficient.**

The meteoric rise of this category can be traced to our ongoing adaptation to a post-pandemic world. As we return to offices, travel, and the rhythms of “normal” life, we want reassurance that our companions at home are safe, and still feel loved in our absence.

As with any smart home device, connectivity and multi-functionality are key. When a pet is as beloved as a child, products designed for them should serve owners just as intuitively, and vice versa. These innovations are increasingly integrated with mobile apps, designed to streamline care and give peace of mind.

And this evolution benefits pets just as much as their people. From communication between wearable health trackers and home-based monitors, to technology that allows animals to safely come and go, or engage in remote play, the aim is enhanced wellbeing.

Even smart collars are now syncing with intelligent litter trays to monitor pets’ health in real time.

Beyond tech, customers want their homes to be as safe and comforting for pets as they are stylish. Take Ikea’s 2024 UTSÅDD collection: designed in collaboration with vets, pet experts - and even the pets themselves - it’s centred around the four essential activities of animal life: eating, sleeping, playing, and hiding. A seamless design approach that appeals to every member of the household, whether they walk on two legs or four.

As smart pet care continues to evolve, we can expect this technology to become not only more sophisticated, but also more affordable and accessible. As with many early innovations, what begins as niche will soon become standard, integrated seamlessly into mainstream home ecosystems. From entry-level solutions that sync with smartphones to fully automated systems designed to support multi-pet households, the future of pet care is one of inclusivity, intelligence, and ease.



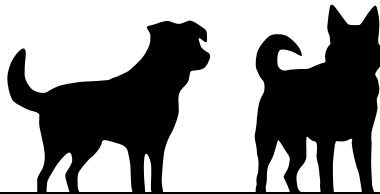


Future living, fur-inclusive...



Pawport

Showcased at CES 2025, this Smart Pet Door transforms conventional doggy flaps into secure, automated entry points. Using Bluetooth collar tags and an app, it customises access schedule, tracks outdoor activity, and integrates with Alexa, Siri, and Google - aligning with smart-home connected pet ecosystems. Its rugged steel-and-aluminium build, dual-deadbolt security, weatherproof tunnel, and LED lighting combines modern convenience with home safety.



Drew Barrymore’s Beautiful

Barrymore expands her *Beautiful* collection into pet care with chic, coordinated essentials: a boucle bolster pet bed, sleek water fountain, and elevated stainless-steel bowl set. Each piece blends form with function - machine-washable, non-slip, whisper-quiet, and BPA-free. Sold exclusively at Walmart, the line reflects her signature style and thoughtful craftsmanship to seamlessly integrate pet comfort into interior design.



LG AeroCatTower

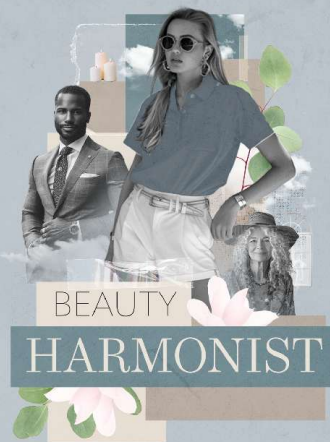
Also unveiled at CES 2025, the AeroCatTower merges an air purifier with a feline-friendly perch, complete with heater, built-in scale, and health tracker. The device senses when a cat is present, pausing purification for peace, then boosts airflow once they leave to clear dander and allergens. Managed via LG ThinQ app, it records weight and sleep metrics, blending pet comfort with wellness monitoring in the modern connected home.

**Eco Guardians** are drawn to solutions that combine intelligent design with low environmental impact; smart, multifunctional products made from sustainable materials that minimise waste and conserve energy. From connected feeders that reduce overconsumption to tech-enhanced health monitoring that prevents unnecessary treatments, efficiency matters.



These consumers value brands that prioritise durability, repairability, and ethical production, offering pet care that aligns with their wider lifestyle of conscious consumption.

**Beauty Harmonists** seek pet care that complements their carefully composed environment. Products that look refined and support a serene sensory experience. They favour litter trays, feeders, and accessories which minimise clutter, neutralise odours, and preserve the tranquillity of the home.



This consumer values brands that offer seamless integration of care and design, where aesthetics, function, and sensory harmony coexist effortlessly.

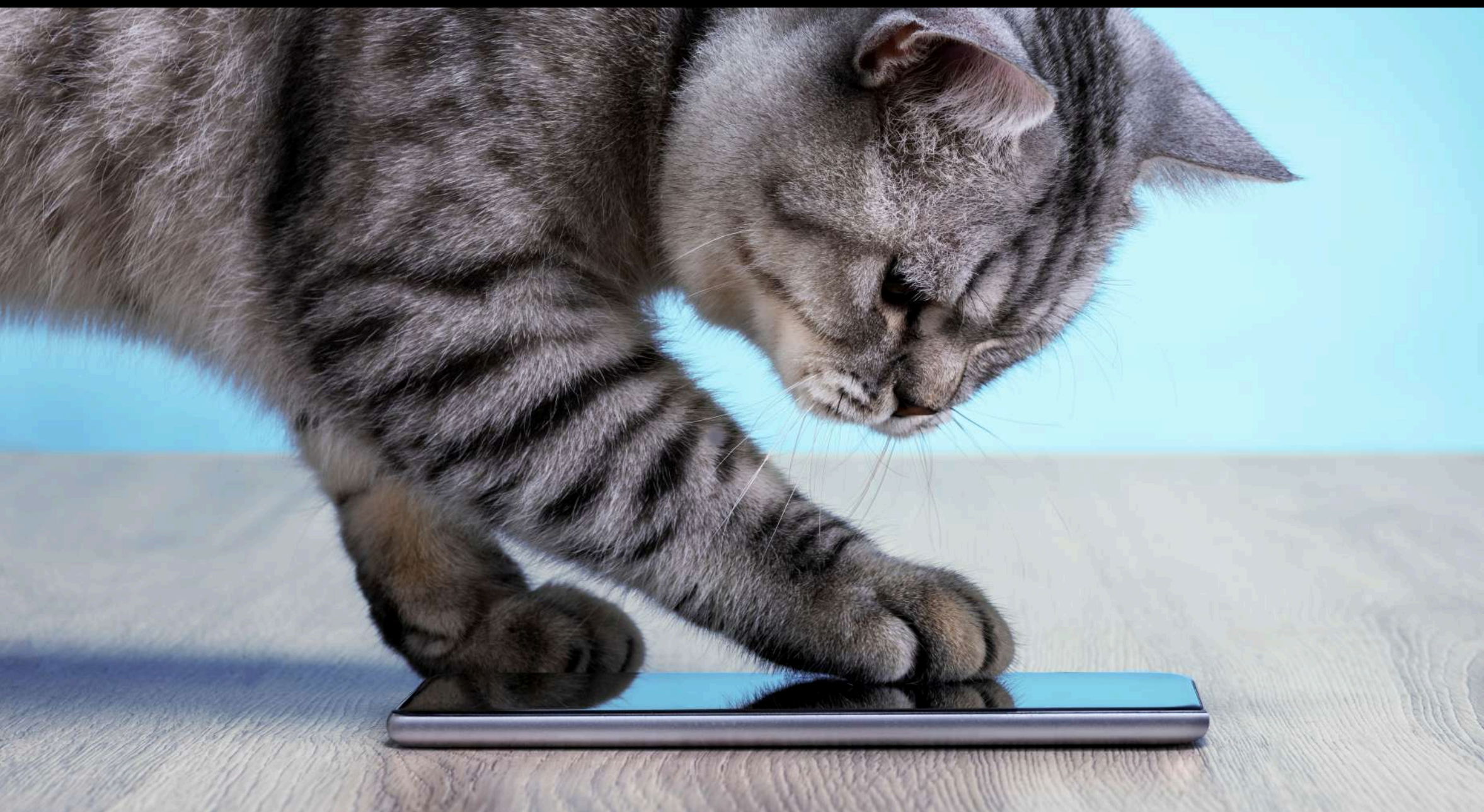
**Tech Voyagers** are excited by pet care innovations that merge cutting-edge functionality with seamless integration into their connected lifestyles. They look for intuitive products that offer real-time data, automation, and compatibility - tools that streamline care.



From voice-activated feeders to health-monitoring wearables synced with home hubs, they value efficiency, control, and insight. Clean design and quiet operation are also key, enhancing both performance and user experience. For Tech Voyagers, intelligent pet care is a natural evolution of the smart home.



# Predictive pet care



54%

“Only 54% of millennials and Gen Zers rely on [vets] for information, with 34% turning to online sources instead.”

*Statista, 2024*

\$17bn

“The Pet Tech Market was valued at \$7.63 Billion in 2024, and is projected to reach \$17.25 Billion by 2030.”

*Research & Markets, 2025*

41%

“The global pet wearable market size is projected to grow from \$4.16 billion in 2025 to \$10.43 billion by 2032.”

*Fortune Business Insights, 2025*

\$15bn

Global smart-connected pet collars market is estimated to grow from \$505 million in 2025, to \$1,027 million in 2032.

*Metatech Insights, 2025*

**With so many aspects of pet care now in the hands of owners, it's no surprise that artificial intelligence is being harnessed to help safeguard the health and wellbeing of our animal companions, now and into the future.**

AI is particularly well-suited to this space, where the sheer variety of breeds, behaviours, and biological systems - across dogs, cats, small animals and even exotics - creates both complexity and opportunity. The challenge lies in the number of variables - the potential lies in AI's ability to process them at scale.

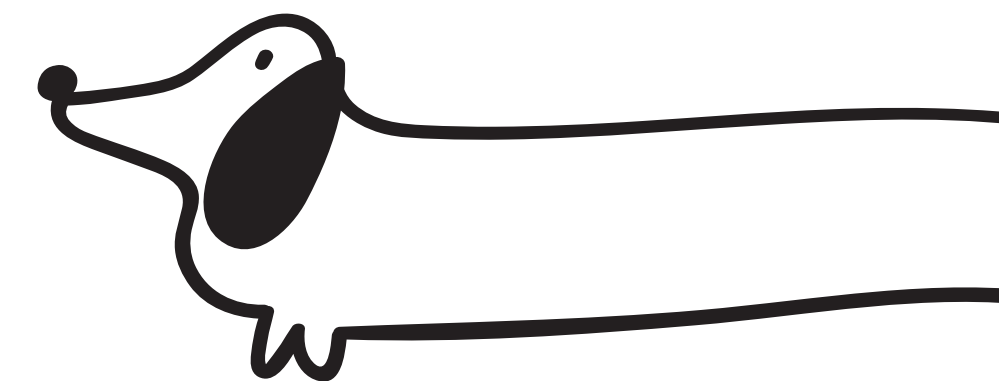
By drawing on veterinary records, behavioural observations from owners, and data from wearable devices, AI can generate meaningful, personalised insights. Rather than offering generalised advice by breed, these systems can support tailored care that responds to the unique characteristics of each animal.

This holds added significance in light of the financial pressures many owners face. Veterinary costs and insurance premiums can be overwhelming, especially when trying to pre-emptively care for a pet without knowing whether something is truly wrong. AI has the power to provide early indicators of health or behavioural issues, offering reassurance - or a warning - before costly interventions are required.

Several key factors will drive the wider adoption of this technology - the digitisation of pet care records, increased integration between vet practices and health-tracking apps, and the ability to report on wellbeing in near real-time. All together a more connected, collaborative ecosystem.

As these sophisticated tools become more mainstream, we expect to see a wave of user-friendly apps that offer instant advice and support - no vet contact or expensive hardware required. With just a smartphone camera, pet owners will be able to upload images of symptoms or conditions and receive AI-powered assessments, opening the door to accessible care for those with lower disposable income.

And the benefits aren't purely physical. Predictive technologies are also playing a growing role in tracking emotional wellbeing. Subtle shifts in behaviour (often early indicators of anxiety or stress) can be monitored and interpreted by AI systems to help owners better support their pets' mental health.



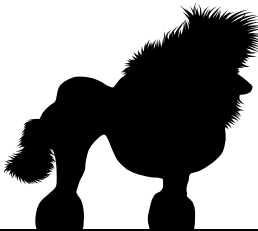


# Predictive pet care...



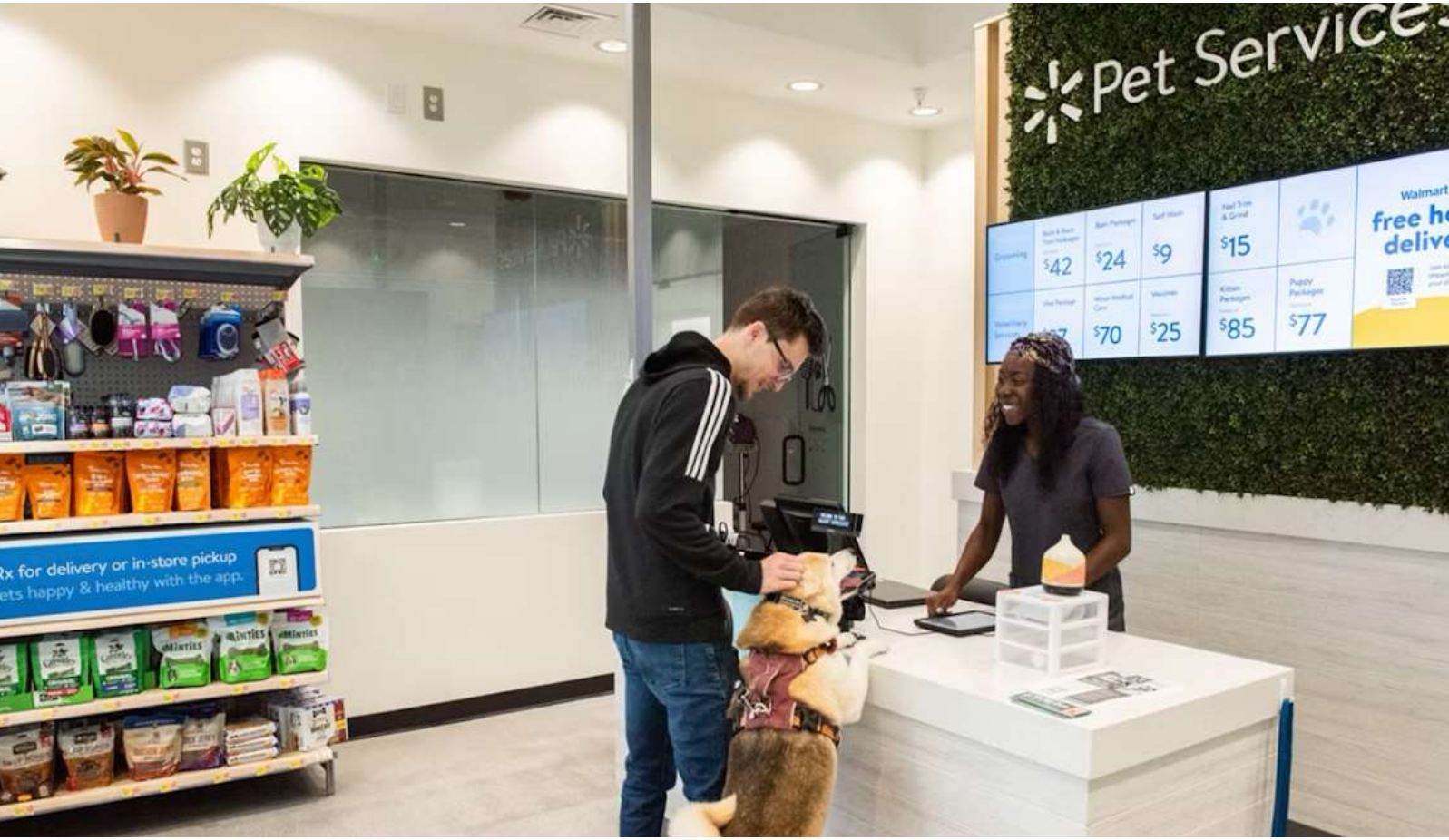
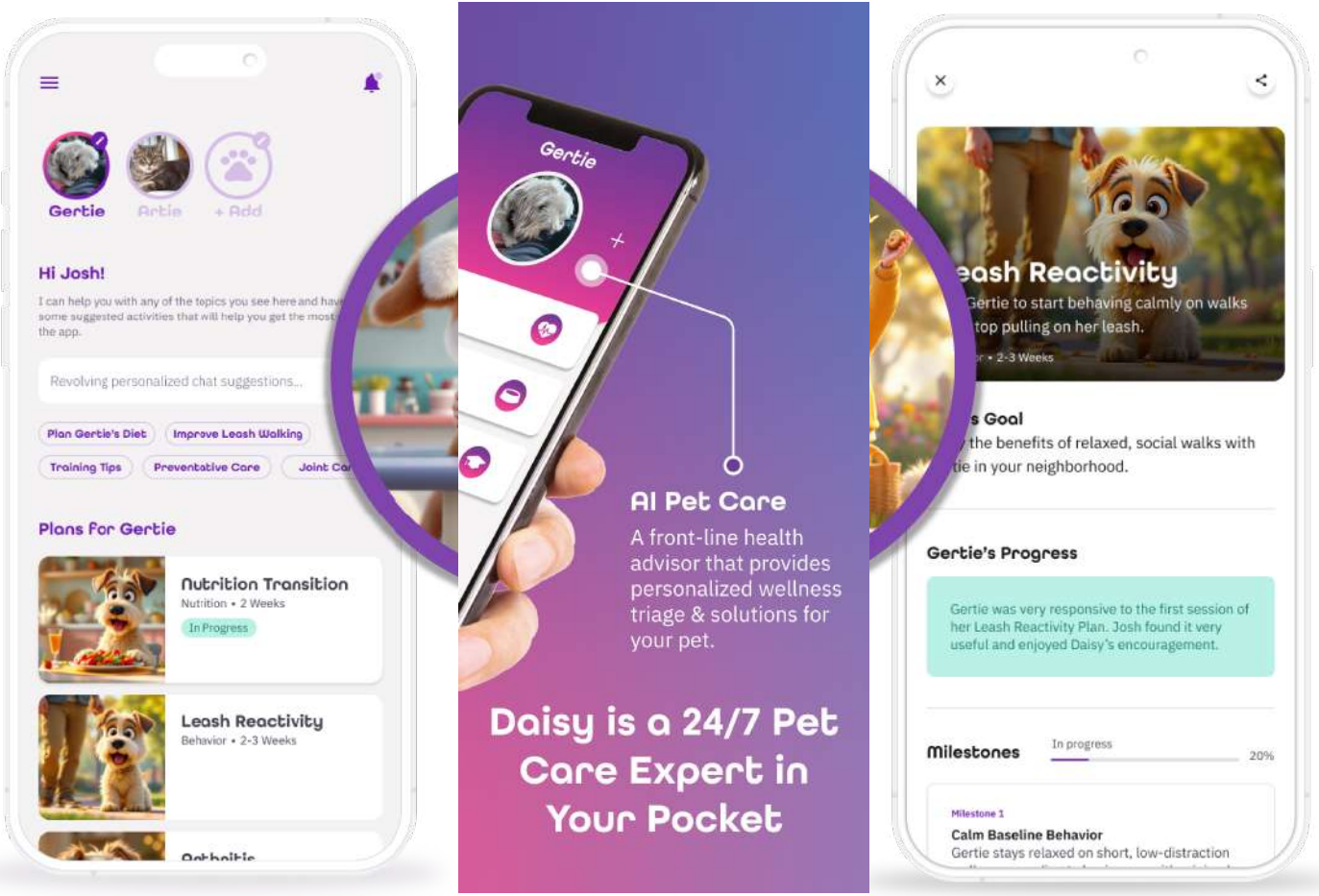
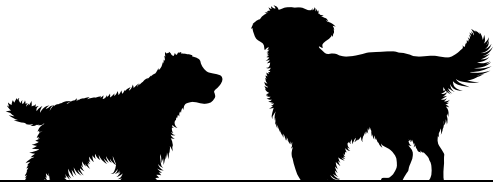
## Maven

Maven is a smart, AI-powered 24/7 pet health tracker that proactively monitors activity, sleep, respiratory rate, itching, water intake (plus heart rate for dogs) to detect early signs of illness. Working alongside vets, its collar and hub capture baseline metrics and flag anomalies - transforming raw data into wellness insights - so owners can intervene early, reducing stress and serious health issues in companion animals.



## Daisy

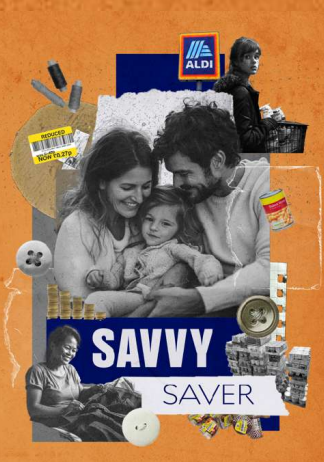
Daisy is an AI-powered pet health companion that uses image recognition, chat-led triage, and behavioural analysis to predict and prevent issues before they escalate. Owners can photograph symptoms or stool, log meals, and track routines - while Daisy's machine learning builds a personalised health baseline. The app flags changes early, helping reduce unnecessary vet visits and supporting more proactive, preventative care for cats and dogs.



## Walmart Pet Services

Walmart is broadening its pet wellness ecosystem by opening five new Pet Services Centres in the US, offering in-store veterinary exams, grooming, and pet supplies alongside online vet access - free 24/7 via Walmart+ (through a Pawp partnership) - and doorstep delivery of prescriptions through its Pet Pharmacy. This fully integrated, omnichannel model delivers affordable, convenient care and reflects Walmart's strategy to capitalise on fast-growing pet healthcare demand.

**Savvy Savers** see the growing use of AI in pet care as a practical solution to rising costs and uncertainty. While they may not seek out cutting-edge tech for its own sake, they value tools that offer reassurance, early detection, and long-term savings. User-friendly apps that deliver personalised insights without intense expenses - align perfectly with their desire for cost-effective, informed care.



Brands can appeal by highlighting how AI reduces unnecessary spending, helps avoid emergency interventions, and empowers owners to make smarter, strategic decisions for their pets' care.

**Tech Voyagers** are energised by the potential of AI to transform pet care into a smarter, more responsive system. They're eager to explore tools that offer real-time insights, predictive diagnostics, and personalised recommendations - turning care into a data-informed experience.



They're early adopters of wearables, health-monitoring platforms, and integrated vet tech, seeing their pets' wellbeing as an exciting frontier for tech-enabled optimisation. For this consumer, AI isn't just convenient - it's a gateway to deeper understanding, greater control, and next-level companionship.

**Track & Trends** are drawn to AI-powered pet care as it gains visibility across social platforms and becomes the latest must-have upgrade among pet owners. Influenced by viral demos, creator reviews, and trending apps, they're quick to adopt tools that promise smarter, more modern ways to care for their pets.



They're especially interested in user-friendly tech with shareable features - like instant symptom scans or personalised health tips - that make them feel ahead of the curve. To engage them, brands should prioritise social buzz, sleek design, and overall newness.



# Shared joy, elevated spaces



55%

“55% of [UK] owners claim they would stay longer at a place if they had their dog with them...52% said they would spend more.”

*The Kennel Club, 2022*

67%

“The Pet Tech Market was valued at \$7.63 Billion in 2024, and is projected to reach \$17.25 Billion by 2030.”

*Hoo Hotels, 2022*

\$66bn

“The global pet services market size is projected to grow from \$45.58 billion in 2025 to \$66.23 billion by 2032”

*Fortune Business Insights, 2025*

\$2.59bn

The pet perfume market is estimated to be valued at \$1.55 billion in 2024, and is expected to reach a valuation of \$2.59 billion by 2034”

*Future Market Insights, 2024*

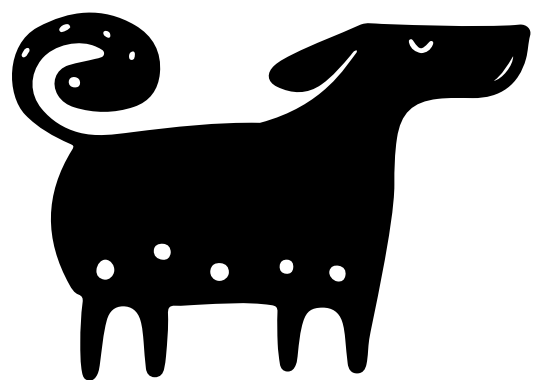
**As pets become ever more cherished members of our families, and their owners navigate a return to the workplace, a new wave of pet-centric experiences is emerging - designed to seamlessly, and joyfully, integrate animals into daily life.**

From experiential retail to luxury pet accessories, the rise of pet hospitality and leisure offers moments of shared indulgence for pets and their owners. Treat culture has extended beyond the human sphere, bringing delight to our furry companions through products and services that elevate everyday routines. Even pet fragrances are becoming a sought-after accessory, reflecting the growing desire to care for animals with the same attention to detail, sensory pleasure, and self-expression we apply to ourselves.

One notable evolution is the emergence of co-working spaces and private members' clubs designed specifically with pet owners in mind. These thoughtfully curated environments offer stylish, functional spaces where owners can work and socialise, while pets are cared for with premium amenities - from play areas and pet chaperones to behavioural monitoring and on-site veterinary support.

This expansion of pet-friendly living continues into other domains too: cinemas, spas, hotel stays, and even theme parks now cater to four-legged visitors, with destinations like Dubai's Dogventure HQ and Mutts & Martinis water park leading the way.

At the heart of this shift is a desire for connection - pet parent to pet parent, pet to pet. In a time where loneliness is a growing concern, these spaces offer new opportunities for community and companionship. Just as brands have worked to welcome new mothers into environments once seen as unwelcoming, so too are they embracing pet owners who no longer wish to leave their animals behind.





Shared joy, elevated spaces...



Le Bon Marché

Le Bon Marché’s *Je t’aime comme un chien!* reimagined retail as a stylish, multisensory celebration of dogs and their humans. From sculptural bone escalators and curated interiors to doga sessions, grooming pop-ups, and the playful *Casa del Doggo* café, the Parisian department store created a social destination where pets are honoured as part of the lifestyle - bridging luxury, community, and modern pet-first design.



Hound House Toronto

This members-only urban clubhouse and indoor park for dogs and their owners is designed with minimalist elegance - neutral tones, biophilic moss ceilings, and sculptural accents. It combines co-working booths, quiet phone pods, café/bar, spa, and off-leash play areas with professional “cha-paw-rones” on duty. Rooted in founder Lauren Guizzetti’s vision, it cultivates community, convenience, and elevated hospitality for urban pet families.



Harlow Harry

This artisanal dog parfum collection offers Brooklyn-chic scents like Bellevue162, D’bacca169, and Hunter33, crafted with top, heart, and base notes by a Grasse-trained perfumer. Presented in elegant glass bottles, these vet-approved gender-neutral fragrances let owners twin scents with their dogs. The brand elevates grooming into a luxury sensory ritual, blending premium ingredients with immersive lifestyle appeal for design-conscious pet parents.

In this convergence of lifestyle, innovation, and connection, **Tech Voyagers** are drawn to experiences that seamlessly integrate pets into everyday routines. These consumers appreciate tech-forward environments that cater to both productivity and pet wellbeing, and are likely to champion venues that offer data-driven care, personalised services, and real-time behavioural monitoring in co-working clubs.



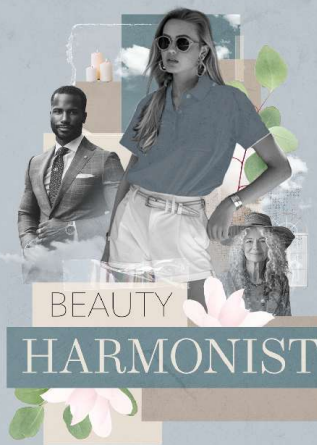
For Tech Voyagers, these spaces represent not just luxury, but the next evolution in intelligent, inclusive living.

**Track & Trends** are energised by the rise of stylish, pet-friendly spaces as they gain traction across social media and influencer culture. Drawn to what’s fashionable and widely shared, they’re quick to visit co-working clubs, pet cafés, or boutique pet experiences that offer visual appeal and social currency.



Whether it’s snapping photos of their dog at a luxe pet spa or trying the latest pet fragrance, they engage for the content, the novelty, and the sense of belonging to a trend. Brands can connect through buzz, aesthetics, and share-worthy moments.

**Beauty Harmonists** are naturally aligned with the rise of elevated, pet-friendly spaces that prioritise aesthetic harmony, sensory pleasure, and intentional design. They’re drawn to environments and experiences that reflect their own refined lifestyle, where pets are cared for with the same elegance and comfort they value for themselves.



From beautifully curated co-working clubs to scent-conscious grooming products and luxe accessories, they seek moments of shared indulgence that feel calm, cohesive, and considered.



# Accessing the Attitudes



## Beauty Harmonist

In much of the new product development in the pet care sector, the Beauty Harmonist is driving innovation and engagement.

Fuelled by elevated packaging and product formulations which match the quality of the luxurious shell, this is your target consumer when your brand does not compromise on quality or aesthetics - because they have the disposable income to back their desire to spoil their pet as much as any other member of their family.

This is one of the key groups driving diversification of the space, as they invest in independent brands over the established household-name brands which dominate supermarket shelves.

With this higher income bracket also comes investment in broader lifestyle services, such as the private members clubs and luxury daycare services now available for pets. Where the rest of the world struggles with balancing a return to the office with pet care, the Beauty Harmonist is able to seamlessly blend a work - pet life balance with the help of these services.

**Target the Beauty Harmonist where you champion aesthetics and quality above all else.**

## Wellness Trailblazer

The Wellness Trailblazer is a close partner of the Beauty Harmonist, as their willingness to make an investment in their furry friends matches the luxurious counterpart consumer.

These consumers are focused on quality but with a very specific prioritisation of long-term health and wellbeing. For the Wellness Trailblazer, the health considerations of their pet are no different to those of any other member of their family.

There is nothing generalised about what this consumer seeks for their pet. Grooming, nutrition, supplementation, their place in the home - everything they purchase for their pet is hyper-personalised to them. They quite literally put the 'care' in pet care.

Products combined with personalised customer service will secure long-term commitment from a Wellness Trailblazer; building their confidence in the visible, proven benefits for their beloved animals, and offering tailored recommendations when routines or products need adjusting.

From clear communication of proven benefits across a brand's visual and verbal identity, to intimate customer service, **knowledge is power when targeting a Wellness Trailblazer.**

## Track & Trend

The Track & Trend consumer purchases based on perception.

This may be knowledge they gain on a product's perceived benefits from social channels and creators they follow. Or it may be the elevated status a brand provides them with when featured on their own curated feeds.

Where there is strong diversification of the pet care sector and an explosion of new product types, there are few better customers to secure an explosion of awareness from.

Brands across industries are building hype and vitality through the merchification of product launches, and it is this type of unique creativity which can help a brand to secure a leading position in the cultural zeitgeist. A brand that can do this whilst staying true to their brand voice can build longevity here beyond a viral moment or a micro-trend.

This consumer is also a key driver of trends built on community. A backlash to the loneliness epidemic many continue to experience.

**A connection with pets, a connection through social platforms, a connection through instagrammable experiences.**





## Savvy Saver

Where there is a great deal of excitement and growth in the pet care space, there remains a struggle for many to afford the new luxuries being launched to market. The Savvy Saver is this consumer group.

Their passion for caring for their pets is no less than those with the high disposable income to invest in advanced nutrition or smart home technology. Their ability to take advanced pet care into their own hands make them a powerful group with (up to now) largely untapped potential for brands.

The increasing application of AI in understanding the nuanced needs of furry friends can help to democratise this space further, and certain brands are already getting in on the action.

From Walmart's extensive in-house services to accessibly-priced apps, **support the Savvy Saver by helping them tackle some of the most financially nerve-wracking elements of pet ownership.**

## Eco Guardian

For the Eco Guardian, simplicity is king. A simple, but effective commitment to protecting the planet whilst protecting the welfare of their pet.

For a significant sector such as pet nutrition, this is evident in brands that offer a mixture of either simple ingredients that are ethically sourced, or lab-grown proteins and ingredients, that are ethically produced.

Alongside simplicity is transparency. Eco Guardians will have no qualms about abandoning a brand that is unclear in their communication of how ingredients are sourced, how formulations are crafted, or how packaging is produced.

The Eco Guardian will not shop frivolously in this new era of growth for the sector. They will not shop based on fads, they will consume purposefully and with long-term viability in mind.

**Where the Eco Guardian is a priority, build beautifully and with longevity in mind, and speak with honesty.**

## Tech Voyager

Some of the most exciting innovation in the pet care sector is fuelled by the Tech Voyager, who are the early adopters of the Attitudes.

The products exciting the Tech Voyager won't become commonplace in the everyday home for some years to come, but they signal the potential of how the humanisation of pets will continue to evolve - and that is the seamless integration of the needs of pets in the home parallel with the needs of their owners.

This technology and its capabilities promote health, cleanliness, and importantly - play. The smart home ensures that the Tech Voyager can integrate the needs of their pet with their day to day life, safe in the knowledge that should their pet be at home alone, they are safe, well cared for, and entertained.

**Where you wish to entice the Tech Voyager, clean, sleek and chic design, multi-functionality and proof of efficacy will capture their attention and their spending power.**

## Routine Ritualist

At first glance, a Routine Ritualist is a difficult consumer group to introduce to new brands or products, due to their often lifelong commitment to routines and products which serve these routines.

However this group is in fact a powerful target when it comes to the significant trends of personalisation. When this is combined with subscription services and elevated customer service, it helps a Routine Ritualist feel confident in the efficacy of their routine. And it is this proof in the pudding that will convert a Routine Ritualist.

Secure the loyalty of the Routine Ritualist through the convenience of the product - such as the growing trend of freeze-dried snacks - and communication of third party validity of said products.

**Where your services can cater to specific needs and adapt on demand, the Routine Ritualist will be swayed. And they will likely stick with you for a long time.**



# The opportunities

## *Understanding your sector*

In a space experiencing staggering growth and diversity, yet with more growth potential and space for innovation (in particular for burgeoning private and own label brands), do you understand where your brand's potential lies?

## *Understanding your audience*

Once your path to growth becomes clearer, establishing the customers who offer the potential for success and for whom your products are most desirable, is the next step in ensuring you are successful in the launch of a new brand or product. Do you recognise which consumer attitude you hold power with, and is this the audience you wish to nurture?

## *Understanding your product*

With your audience comes a clear goal of what it takes to build a product which truly appeals to them. From ingredients and formulation, to packaging and pricing, brands must approach every stage of production with honesty, integrity and authenticity. Does your range meet the standards of the educated and demanding customer of today?

## *Understanding your communications*

The means by which you deliver your product to your desired consumer is key. The world is returning to the high street, and experiential retail combined with intelligent, targeted online platforms - not to mention the ongoing growth of social commerce - is an art form which must be learned in order to deliver to your target audience. Do you know where your consumers are sourcing and shopping?

## *Understanding your competition*

Today's competitive landscape extends beyond rival brands, it includes shifting consumer expectations and the nuanced trade-offs that come with new product or redefining a brand goal. It's essential to evaluate not just who you're attracting, but who you risk leaving behind. How do you grow your audience without diluting your brand?

## *Understanding your identity*

It may be that you are approaching a new product - or a revamp of your brand - in order to enter a new space or appeal to a new consumer audience. Is your brand identity clear, and are you able to retain your existing consumer base, whilst entering a mission to engage with new attitudes?





# Here to help

We hope you found our insights valuable, highlighting the opportunities within the pet care sector, as well as the evolving consumer attitudes shaping this space.

We'd love to help you uncover where your brand's potential lies, how to stay ahead of emerging trends with high growth potential, and how to connect meaningfully with consumers who have greater awareness and more nuanced demands than ever before.

We'd be delighted to present these findings in a tailored format, crafting a personalised report that positions your brand to lead in this evolving landscape.

Get in touch - we're excited to explore what's possible together.

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