



2025

Forward thinking food

9 key trends that are disrupting the global petfood industry



GC Consulting

Forward thinking pet food



The global petfood landscape is shifting! New concepts, new innovations, new technologies and new insights are poised to reshape the entire industry as petfood brands respond to changing perceptions and preferences amongst pet owners worldwide. Despite the rapid pace of these changes and the complex context in which they take place, we have identified 9 trends that we believe have the potential to disrupt the world of petfood. Read on for a taste of what's to come.

1

Raw: Less is more

"Freshly baked", "Home Cooked", "Gently Steamed", "Unprocessed", ... claims like these continue to gain traction across multiple markets as the trend for **raw food** corners the global petfood industry. **Less processed** options made with all-natural or human-grade ingredients promise multiple benefits, preserving vitamins and other nutritional ingredients for a healthier, more natural diet. And while the raw segment used to be

confined to refrigerated or frozen goods, new technologies such as freeze-drying (see below) and semi-moist products offer the benefits of going raw without the cold storage.

Less processing = more nutrition

Less energy = more sustainability

Less artificial = more natural



2 Freeze-dried: locking in the goodness

New technologies continue to fuel **growth in the super-premium segments** for both dog and cat food. **Freeze-drying** is at the forefront of this push for innovation, paving the way for **more complete** and nutritional options when compared with traditional extruded or sterilized products.

Offering many of the benefits of raw food but with a longer shelf-life and easier storage, innovative products like **freeze-dried meats**,

coated raw kibbles and others will make premium petfood even more accessible to a growing number of consumers.

- Freeze-dried products spur growth in premiums
- Nutritional benefits of raw food at a lower price point
- Higher nutrition, longer shelf life, more flexible storage
- Super-premium dog food already at 30% of volume (15% for cat food)



**SUPER-PREMIUM
DOG FOOD
ALREADY AT
30% OF VOLUME**





3

Liquid toppers: the best of both worlds

Wet or dry? That has traditionally been the biggest question pet owners ask when buying petfood. The latest trend for mixed feed offers the best of both worlds. Innovations like **liquid toppers** – often sold with **functional ingredients** – give pet owners a tangible way to enhance the taste and nutrition of traditional dry food – literally “topping up” their meal.

Liquid toppers upgrade dry kibble for cats and dogs

Blurring the boundaries between dry and wet food

Active ingredients push functional benefits



4

Superfoods: naturally functional

Scientific research continues to unlock the secrets of a growing number of “superfoods” – **natural ingredients** that offer a wealth of nutritional benefits as much for pets as their owners. From ginger and turmeric with proven anti-inflammatory and immune-boosting properties to kelp and other seaweeds promising healthy skin and a shiny coat to name but a few examples. **Functional natural petfood** is inspiring more and more consumers while carving out bigger niches of the premium market.



Top 9 superfoods

- Blueberries
- Turmeric
- Fish Oil
- Hemp Seed Oil
- Eggs
- Kale
- Carrots
- Bone Broth
- Dark, leafy greens

* Recent sales of functional cat food show annual growth of 15% from 2019 to 2023 compared with 10% for the broader cat food market. Statistics applicable to the US market.

GROWING DEMAND FOR COMPLETE FOODS WITH HIGH DOSES OF FUNCTIONAL INGREDIENTS

FUNCTIONAL CAT FOOD GROWING 50% FASTER THAN REST OF MARKET*

PAVING THE WAY FOR HEALTH-FOCUSED CLAIMS WITHOUT VETERINARY ENDORSEMENT

FUNCTIONAL SEGMENT AT 90% OF DRY FOOD VOLUME (AND 75% OF VALUE)



5 Growth of premium cat food over the next 5 years

In the United States, **natural cat food** accounts for approximately 60% of the premium segment, with **soft natural formats** representing 70% of consumer spending.

Soft natural products emphasize emotive packaging, catering to consumer preferences, while hard natural products highlight **ingredient transparency and specific health benefits**. The soft natural segment has experienced more robust growth, as it aligns more closely with cat owners' desires for **both emotional and nutritional advantages**.

SOFT NATURALS
COMBINE
EMOTIONAL AND
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NATURAL
CAT FOOD AT 60%
OF US PREMIUM
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SOFT
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GROWING





**“WE NEED A
NEW NARRATIVE.
DOGS DON’T NEED
MEAT, THEY
NEED PROTEIN.”**

*Klaus Wagner,
Animal Nutritionist*

6

Plant-based: rethinking petfood from the ground up

Demand for plant-based foods, treats and supplements continues to grow worldwide in line with the trend for **healthier and more sustainable** petfood options. Once a niche limited to specific markets, the **plant-based segment** now represents around 20% of global consumers, especially in regions like India where the market is estimated to grow over 30% annually over the next 10 years. And while **sustainability** is the main driver of the switch to vegan options, studies also show that it can reduce the use of medication by more than 10%.



**20% of consumers switch
to vegan petfood**

**Growth fueled by mounting
environmental concern**

**Global market for plant-based
petfood currently worth USD 14 billion**

**Estimated 7% annual growth
over the next decade**

Sustainable: reducing the footprint

7

Much of the growth in both **raw and plant-based** products can be linked to a parallel growth in consumer awareness for the **environmental impact** of petfood. In response to the trend, more and more brands seek to add value by reducing the footprint of their entire supply chain and production process. From **locally sourced ingredients** to fully **recyclable packaging**, an enhanced focus on sustainability is already paying dividends for forward-thinking brands.

SUSTAINABLE
PROCESSING AS
IMPORTANT
AS THE PRODUCT
ITSELF

ENVIRONMENTAL
CLAIMS BOOST
SALES IN
KEY MARKETS

GROWING
CONSUMER
AWARENESS DRIVES
DEMAND FOR
SUSTAINABLE
OPTIONS



8

Single ingredient: multiple opportunities

Online searches for “healthy pet food” have grown more than 600% over the past 12 months. The parallel growth in demand amongst pet parents for healthier options is driving the popularity of **single-ingredient foods**, especially in **treats**. Single-serve products, 100% meat-based treats and other products offering pure and **high-quality proteins** are gaining traction not only in the US but in Europe and Asia as well.

**Single-ingredient products
meet demand for healthier treats**

**Increased focus on high-protein diets drives
worldwide growth**

9

Transparent: cleaner labels for clearer nutrition

The push towards raw, natural and single-ingredient foods can be seen as part of a wider trend towards **cleaner labels** on petfood, treats and supplements. Employing new technologies that eliminate the need for fillers, preservatives, artificial ingredients and other additives has been shown to boost perceptions of **quality** amongst consumers seeking **healthier and safer food** for their pets.

Clean labels enhance perception of quality and safety

Fewer artificial additives boosts transparency

In line with global trend for natural, sustainable nutrition



Looking to tap into new opportunities?



GC Consulting's proven expertise and multidisciplinary approach has already made the difference for many brands around the world. It's time to make the future work for yours! Contact us today for an obligation-free assessment.

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