

Pet Retail 2026: Navigating Industry Emerging Trends on the Show Floor

SUPERZOO 2026

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NielsenIQ



NIQ provides the *Full View*™ of the total pet market

The only holistic view of pet available in the industry



Complete pet channel measurement

The only complete pet channel measurement available in the industry *across the total store* including pet food, treats, consumables, hardlines, and supplies.



Expansive omnichannel pet coverage

A *true omnichannel view* with brick & mortar, e-commerce, and omni breaks. Expansive specialty pet, conventional, and online retail coverage with rich POS data and the industry's best omni panel data for a complete view of the market.



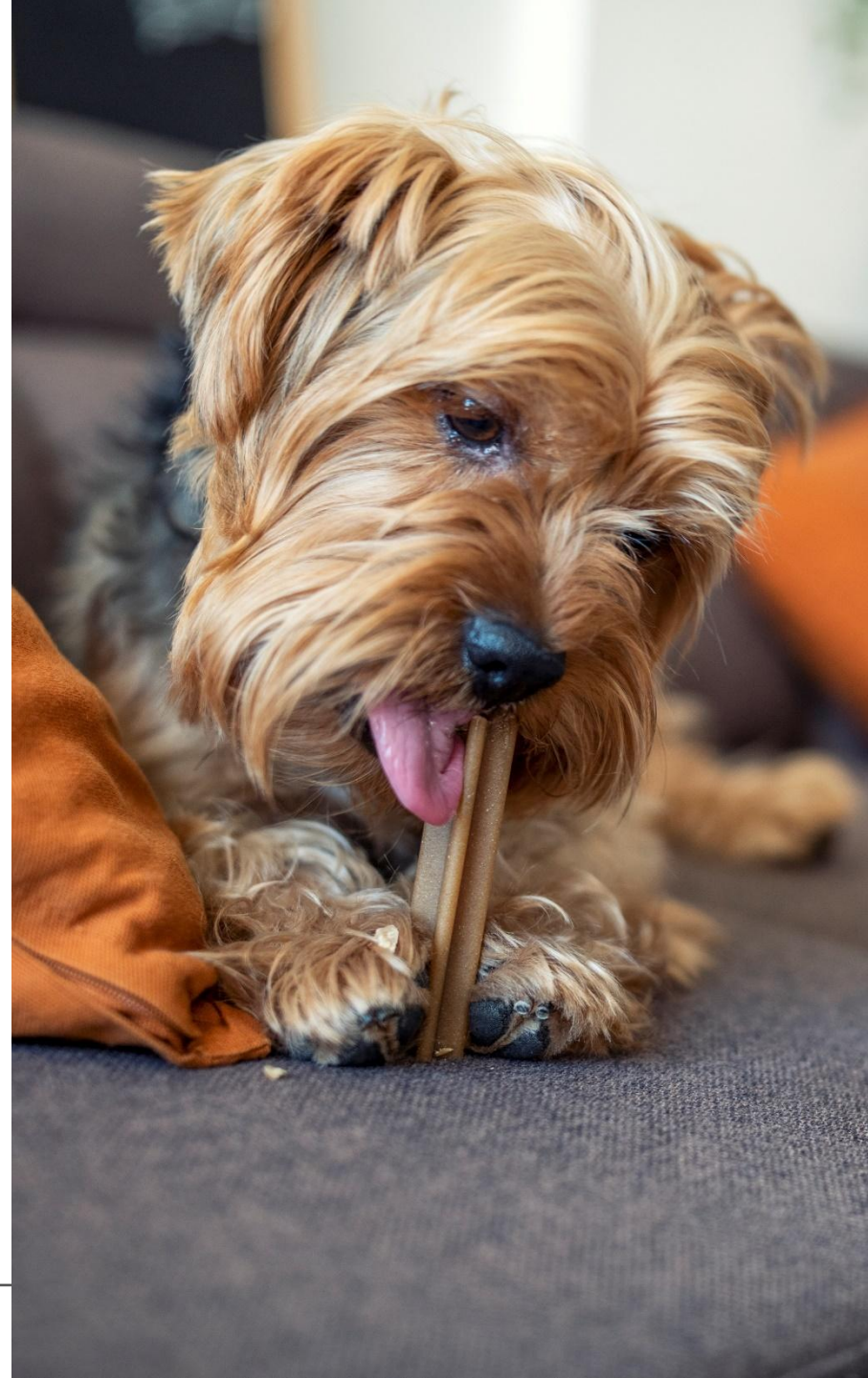
Unmatched pet attribution & item database

The *most extensive pet item database*, robust product attribution data, and custom pet characteristics for critical granularity into complete market truth.



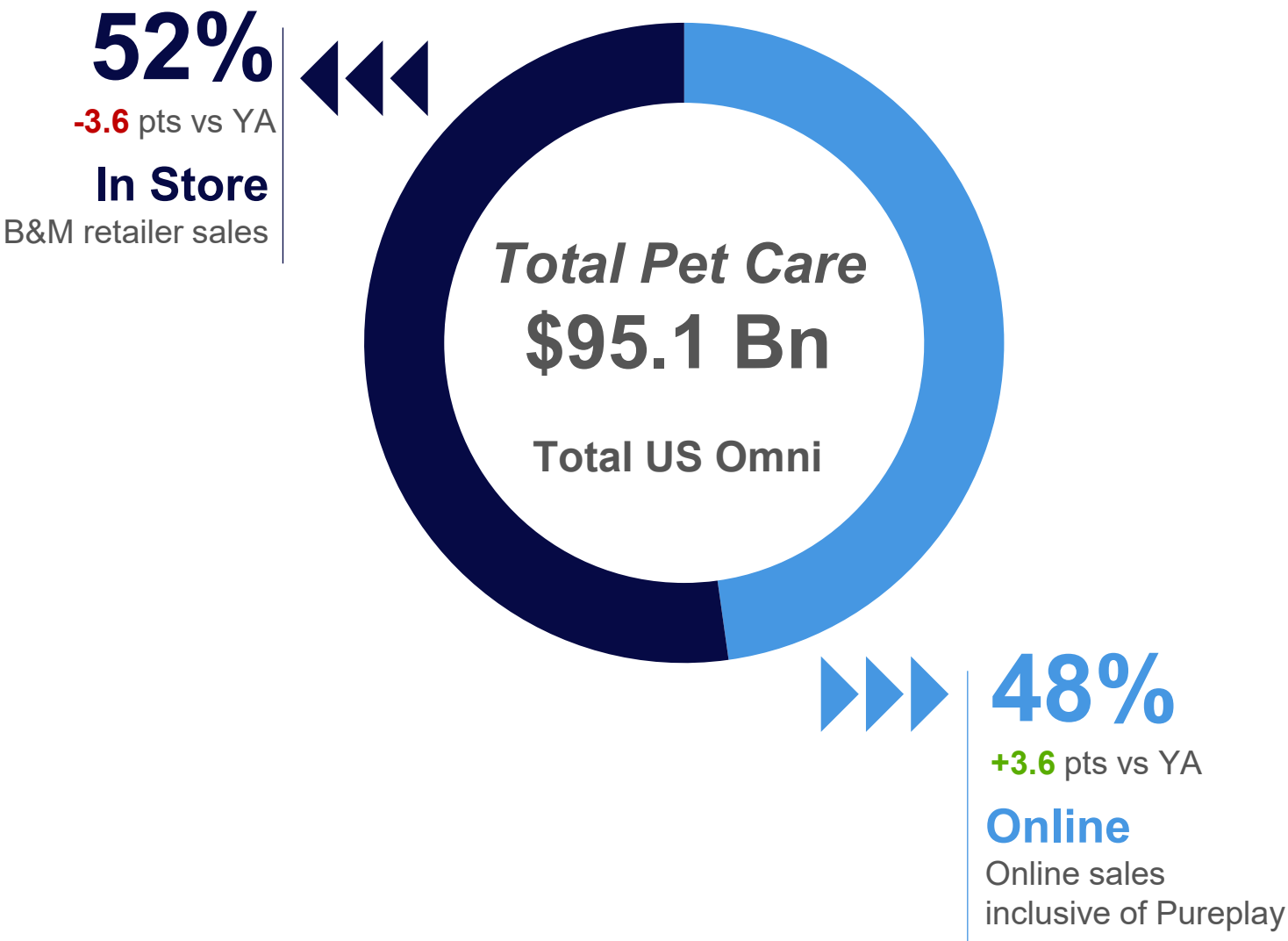
Pet industry leaders

We are the primary provider to the vast majority of pet manufacturers and pet retailers of all sizes - and a *strategic partner to APPA, WPA, and IndiePet*.



The importance of seamless commerce is *evident in the channel dynamics*

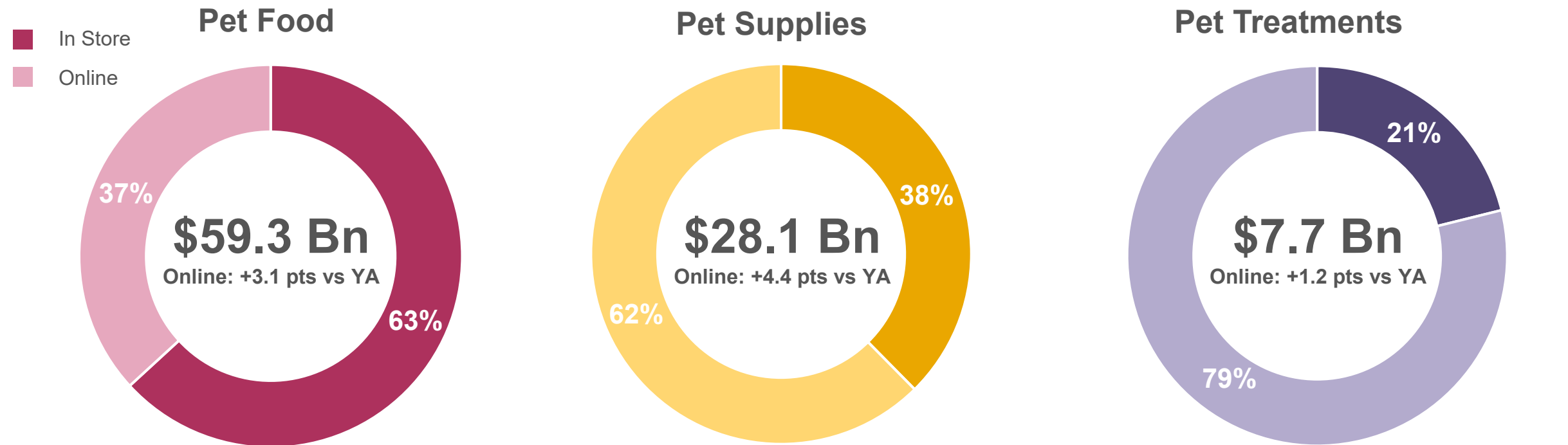
Online is commanding more of the consumer wallet while In Store sales decline



Market	\$ % Growth	Unit % Growth	Price % Growth
Total US Omni	+5.5%	+2.1%	+3.3%
Total US In Store	(1.4%)	(0.9%)	(0.5%)
Total US Online	+14.1%	+11.7%	+2.1%

Channel preference varies by pet parent need state *although channel trends remain similar*

Nearly two-thirds of Pet Food sales still take place In Store, but sales are shifting to Online

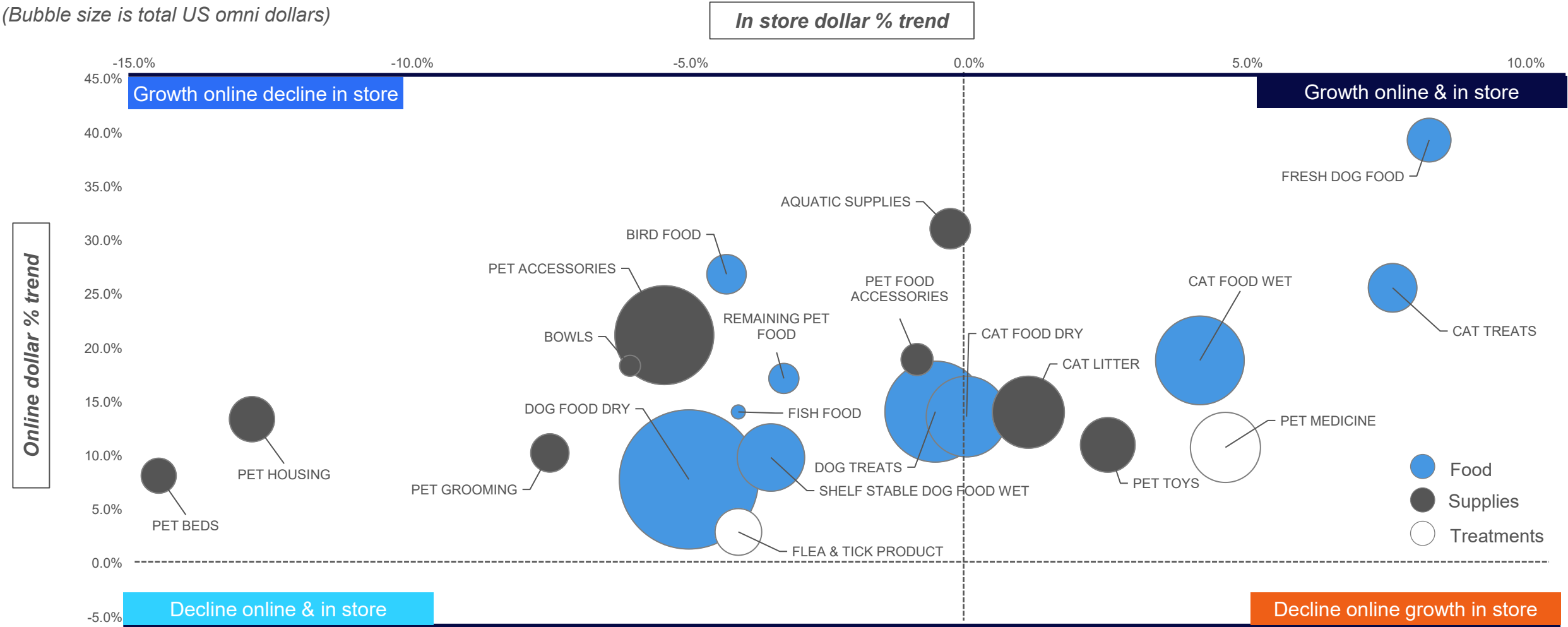


While online growth is for all, *In-Store growth is targeted*

Consumers are still driving In-Store growth primarily for proactive healthcare and cat species needs

Sales and Growth by Pet Care Category

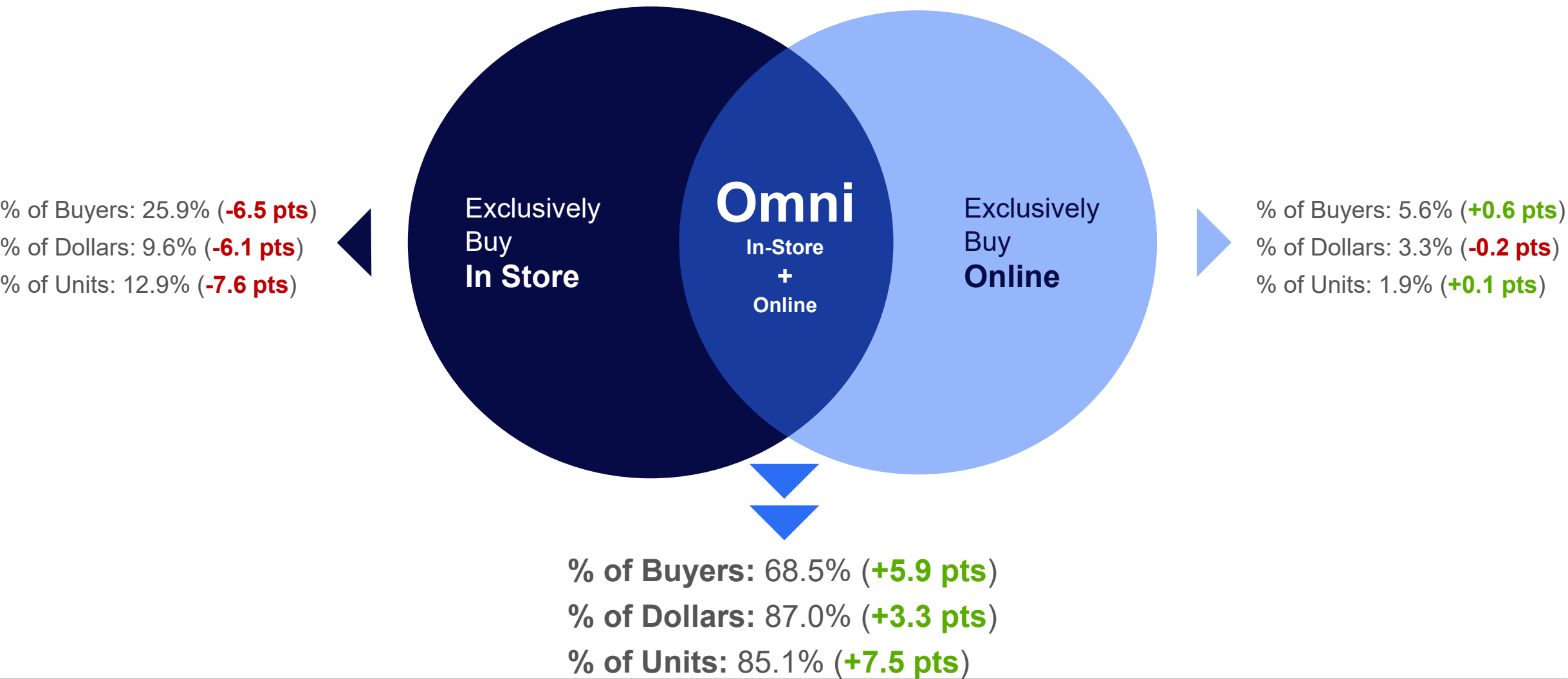
(Bubble size is total US omni dollars)



Seamless commerce is necessary for 69% of customers, *those most valuable to the department*

Provide multiple shopping avenues to meet the consumer wherever they are on their purchase journey

Where are Total Pet Care buyers making their purchases?





**How can stores
and brands
stay relevant
in this evolving
market?**

Pet Parents are putting their dollars behind four key themes

**Functional
Wellness**

**Humanization
2.0**

**Enrichment &
Engagement**

**Smarter Pet
Parenting**

10 Growth Trends in 2026 following those themes

#1

**Gut Health
Gold Rush**

#2

**Functional
Becomes
Fundamental**

#3

**Fresh is a
Spectrum**

#4

**Protein
Obsession
Prevails**

#5

**Treats
Reinvention**

#6

**Enrichment
is Emerging
as a Category**

#7

**At-Home
Health
Continues
Growth**

#8

**Pet Care
Meets Beauty**

#9

**DIY Pet
Parenting**

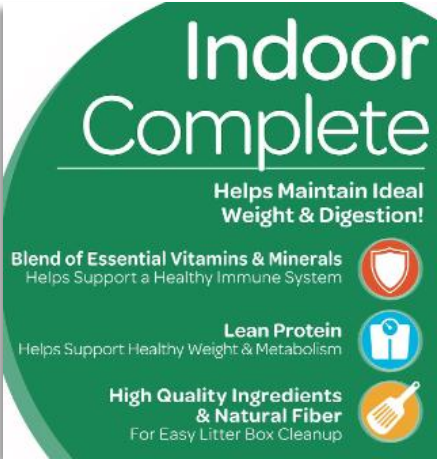
#10

**Connected
Pet Care**

NIQ reveals everything about every product with the industry's most granular attribution data

Stated Attribution

Captures standardized attributes on the label across a set of products by analyzing claims, warnings & certifications



Obesity Support Stated
Digestive Health Support Stated
FDA Minerals Presence Stated
FDA Vitamins Presence Stated

FDA Protein Presence Stated
Immune System Support Stated
Metabolism Support Stated
FDA Fiber Presence Stated
Natural Positioning Stated



Qualified Attribution

Uncovers attributes not physically stated on the label by analyzing nutrients & ingredients via regulations & requirements

INGREDIENTS: WHOLE GROUND CORN, CHICKEN BY-PRODUCT MEAL, SOYBEAN MEAL, MEAT AND BONE MEAL, BEEF FAT (PRESERVED WITH MIXED TOCOPHEROLS), CORN GLUTEN MEAL, WHOLE WHEAT, NATURAL FLAVOR, SOYBEAN HULLS, SALMON MEAL, PHOSPHORIC ACID, DEHYDRATED ALFALFA MEAL, SALT, TITANIUM DIOXIDE (COLOR), CHOLINE CHLORIDE, VITAMINS (VITAMIN E SUPPLEMENT, NIACIN, VITAMIN A SUPPLEMENT, THIAMINE MONONITRATE, RIBOFLAVIN SUPPLEMENT, D-CALCIUM PANTOTHENATE, PYRIDOXINE HYDROCHLORIDE, VITAMIN B12 SUPPLEMENT, MENADIONE SODIUM BISULFITE COMPLEX (SOURCE OF VITAMIN K ACTIVITY), VITAMIN D3 SUPPLEMENT, FOLIC ACID, BIOTIN), MINERALS (FERROUS SULFATE, ZINC OXIDE, MANGANOUS OXIDE, COPPER SULFATE, CALCIUM IODATE, SODIUM SELENITE), TAURINE, POTASSIUM CHLORIDE, RED 40, YELLOW 5, LACTIC ACID, YELLOW 6, BHA (USED AS A PRESERVATIVE), BLUE 1, ROSEMARY EXTRACT. NP001



Contains Corn Qualified
Contains Animal by Product Qualified
Contains Whole Grain ingredients Qualified
Contains Grain Qualified
Contains Natural Flavors Qualified
Free From Artificial Flavors Qualified
Digestive Health Qualified
Contains Taurine Qualified
High Likelihood of GMO Presence Qualified

#1

Gut Health Gold Rush

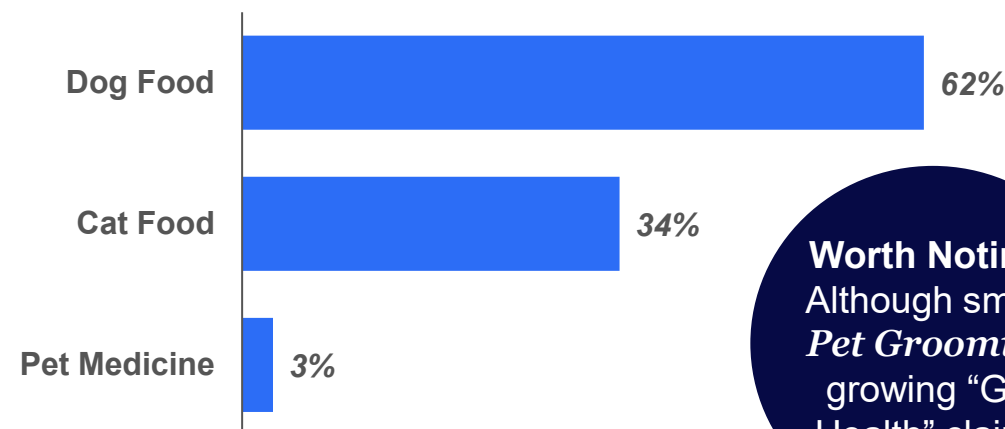
The Gut Health Trio

<i>\$ % change vs year ago</i>	All Products	Prebiotic Group Stated	Probiotic Group Stated	Postbiotic Group Stated
Total Store	2.4%	16.0%	11.0%	50.6%
Pet Care	1.9%	6.5%	5.7%	148.0%

<i>\$ contribution to Pet Care</i>	Prebiotic Group	Probiotic Group
Qualified	27.2%	10.4%
Stated	8.4%	6.4%

+8%
growth for Pet
Care items
with
Microbiome
claims

Gut Health Sales by Category



Worth Noting!
Although small,
Pet Grooming
growing “Gut
Health” claims

Source: NielsenIQ Retail Measurement Data, US NIQ Total Store – 444 – Weekly, Total US Full View (Non-Pet) and Pet Retail Plus (Pet), 52 Weeks Ending 06/27/26. Utilizing NIQ Product Insights (NPI) characteristics.

Gut Health = Prebiotic Group Qualified, Probiotic Group Qualified, Postbiotic Group Stated, Microbiome Stated

#2

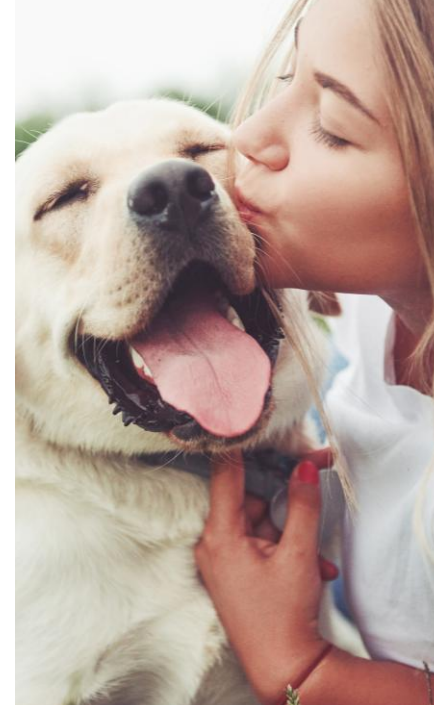
Functional
Becomes
Foundational

NIQ



*Hydration
Health*
(Stated)

\$382M
+19% YoY



*Contains
Collagen*
(Qualified)

\$271M
+19% YoY

*Mood & Stress
Support*
(Stated)

\$965M
+14% YoY



*Contains
Mushrooms*
(Qualified)

\$27M
+67% YoY



#3

Fresh is a Spectrum

Barriers to Fresh Pet Food Purchasing



Shelf Stable Wet Dog Food \$ Growth Rates

By Manufacturing Process Claim

Gently Steam Cooked +9%

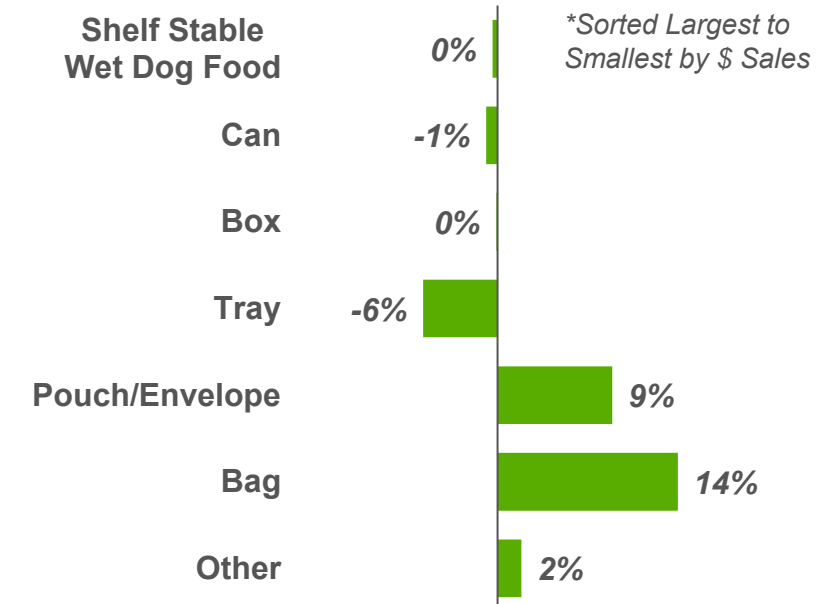
Freshly Roasted Meals +13%

Gently Cooked +12%

Freshly Cooked +92%

Steam Cooked +11%

By Package Type

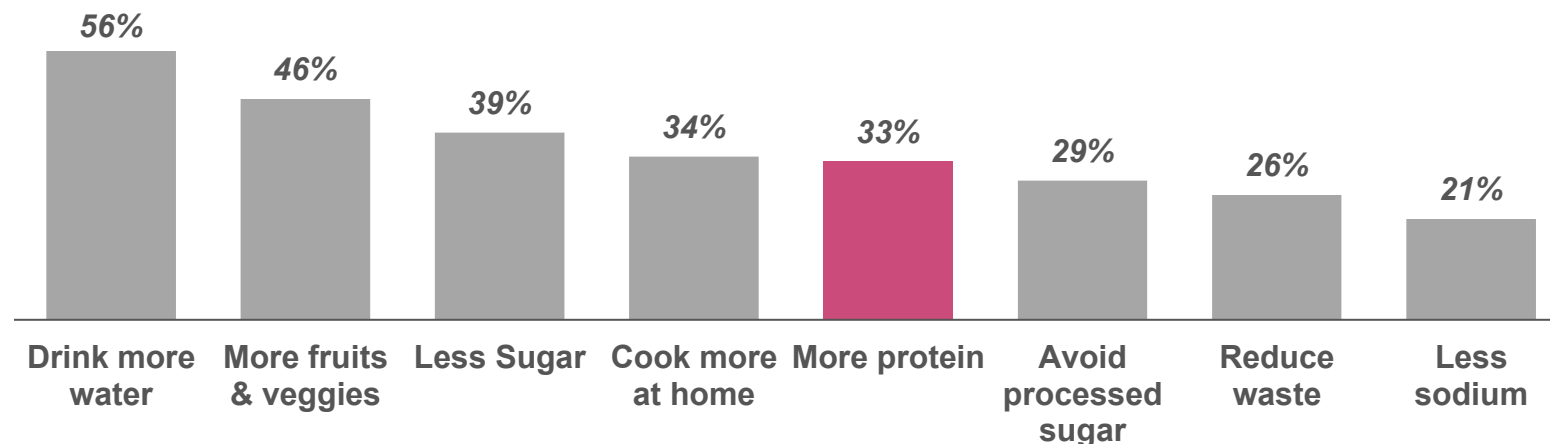


Source: NIQ BASES Quick Question Survey – Fresh Pet Food, August 2025
NielsenIQ Retail Measurement Data, US NIQ Total Store – 444 – Weekly, Total US Pet Retail Plus, 52 Weeks Ending 06/27/26.

#4

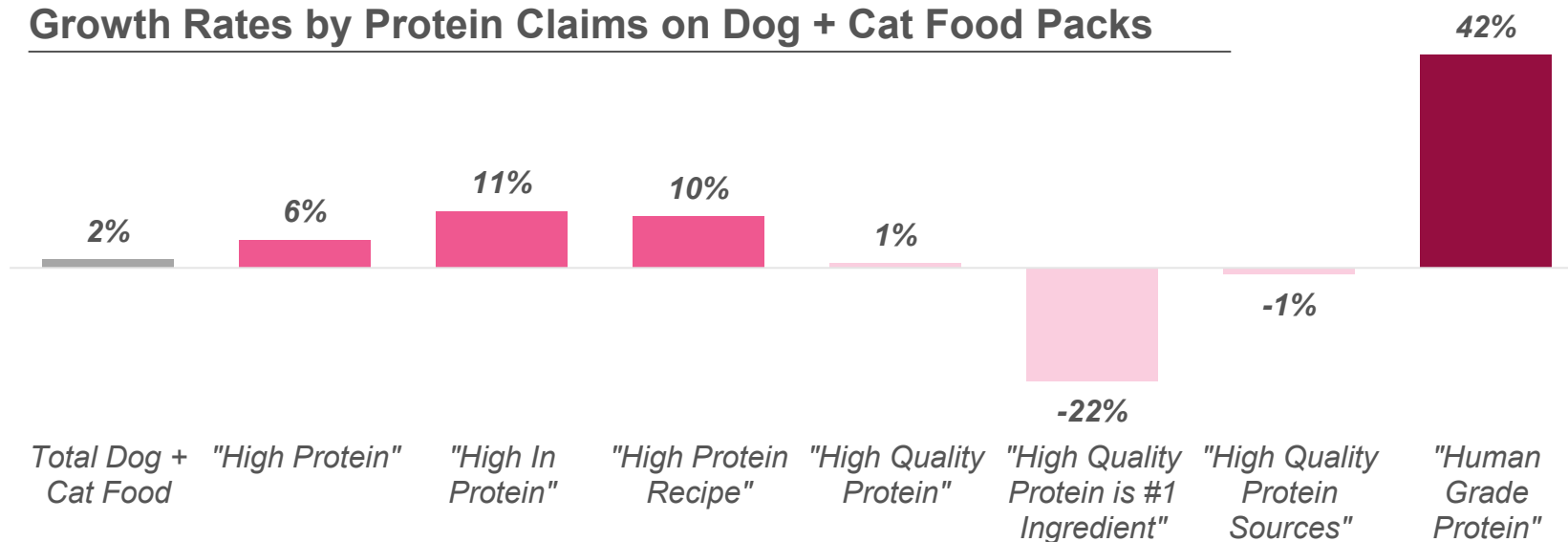
Protein Obsession Prevails

Human Food-Related New Year's Resolutions for 2026



... but the way Protein is communicated matters

Growth Rates by Protein Claims on Dog + Cat Food Packs



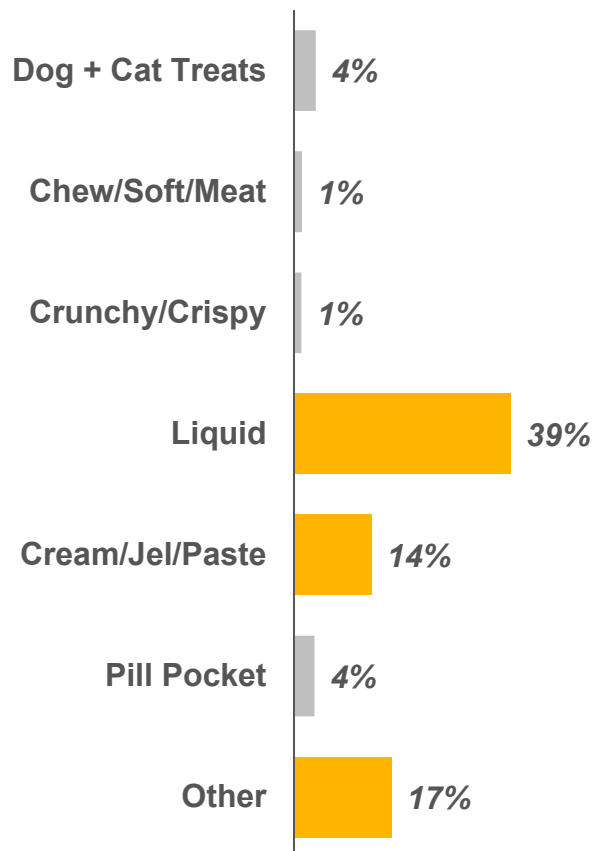
Source: NIQ BASES Quick Question Survey, Dec 2025

NielsenIQ Retail Measurement Data, US NIQ Total Store – 444 – Weekly, Total US Pet Retail Plus, 52 Weeks Ending 06/27/26.

#5

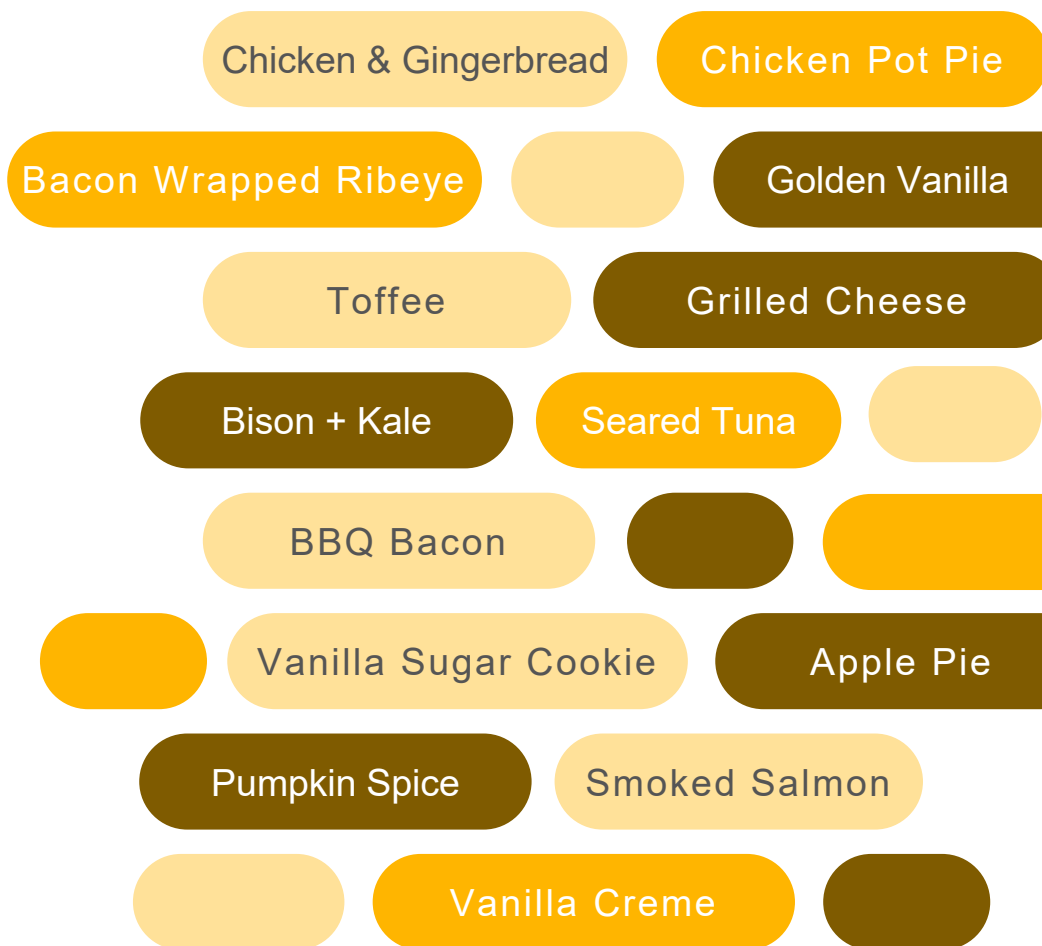
Treats Reinvention

Growth Rates by Treat Type



What's in
Other?
Innovative
formats like
Chips, Pops,
Flakes, etc.

High Growth Treat Flavors Released LY



Source: NielsenIQ Retail Measurement Data, US NIQ Total Store – 444 – Weekly, Total US Pet Retail Plus, 52 Weeks Ending 06/27/26

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#6

**Enrichment
is Emerging
as a Category**



**Electronic
Toys**

Growing 27% YoY

**Lick
Mats**

Growing 9% YoY

**Treat
Dispensing
Toy**

Growing 15% YoY

#7

At-Home Health Continues Growth

82%

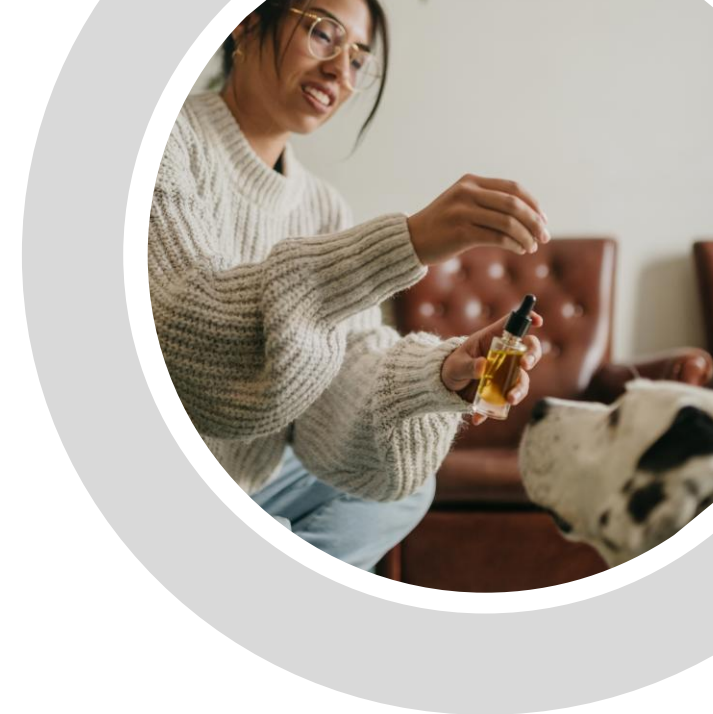
*of pet owners say they
experience some challenges in
understanding their pet's health*

*Pet DNA
Collection Kits*
growing +12%
year-over-year

*Pet Tests
and Test Kits*
growing +13%
year-over-year

*Pet
Supplements*
growing +10%
year-over-year

*Dental
Cleansers*
growing +17%
year-over-year

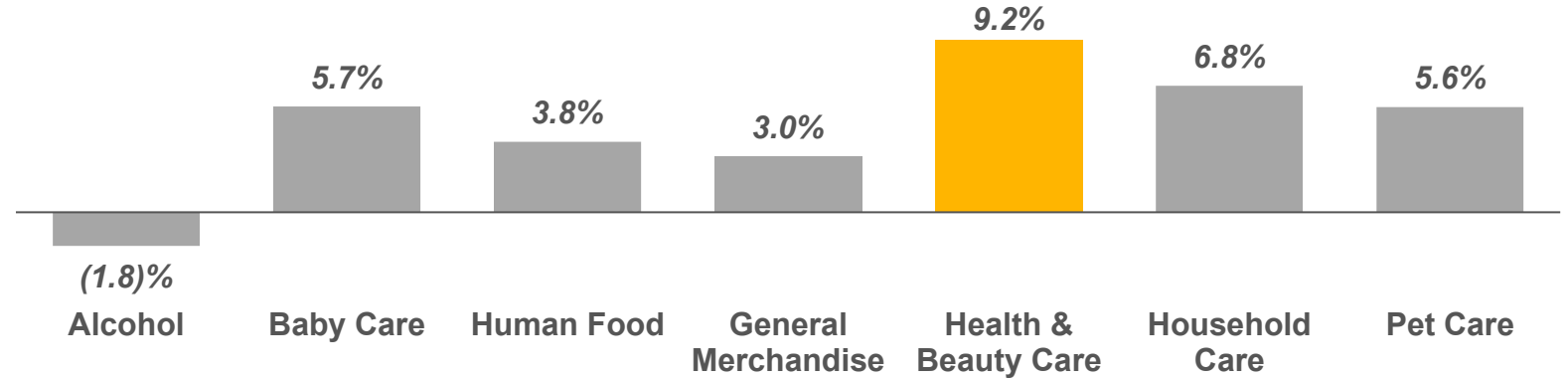


Source: *Pet Health Challenges Study* by HABRI & Chewy, NielsenIQ Retail Measurement Data, US NIQ Total Store – 444 – Weekly, Total US Pet Retail Plus, 52 Weeks Ending 06/27/26

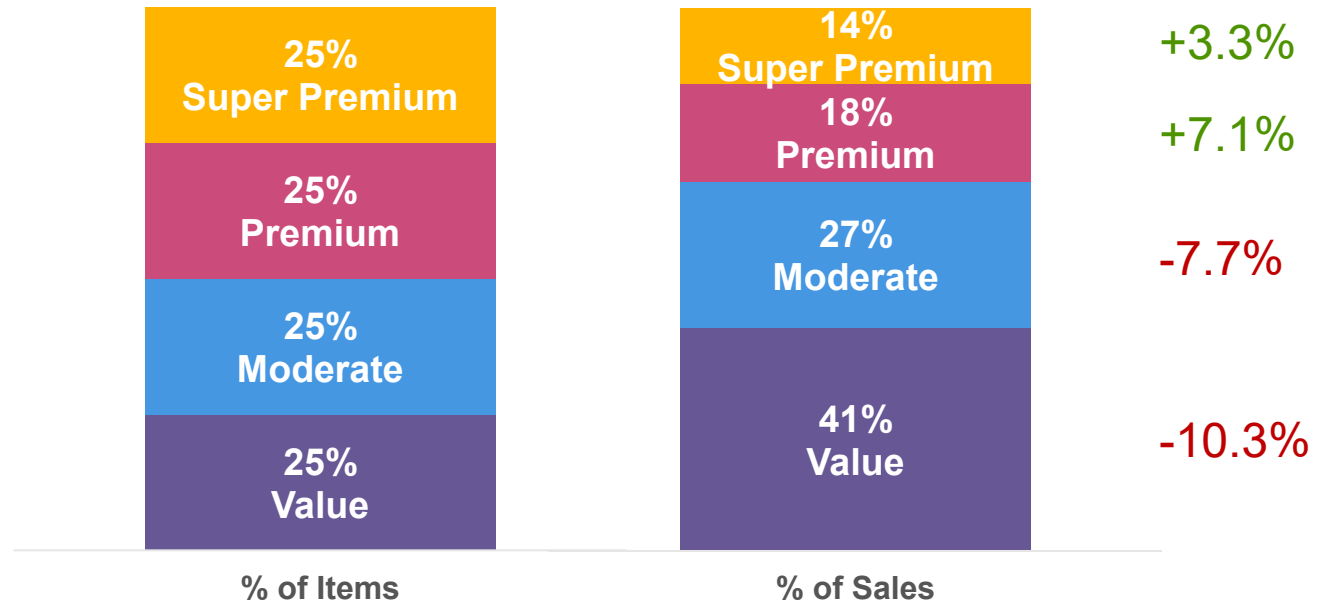
#8

Pet Care Meets Beauty

Growth Trends by Department Across the Store



Growth Trends by Price Tier for Dog + Cat Shampoo/Conditioner Products



Source: NielsenIQ Omnisales+ | Entire Database, Total US Omni, 52 Weeks Ending 06/27/2026; NielsenIQ Retail Measurement Data, US NIQ Total Store – 444 – Weekly, Total US Pet Retail Plus, 52 Weeks Ending 06/27/26

#9

DIY Pet Parenting

Source: NIQ BASES Quick Question Survey January 2026, NielsenIQ Retail Measurement Data, US NIQ Total Store – 444 – Weekly, Total US Pet Retail Plus, 52 Weeks Ending 06/27/26.



21%

of Dog owners say they have fed “Home-made food” in the last week



13%

of Cat owners say they have fed “Home-made food” in the last week



+41%

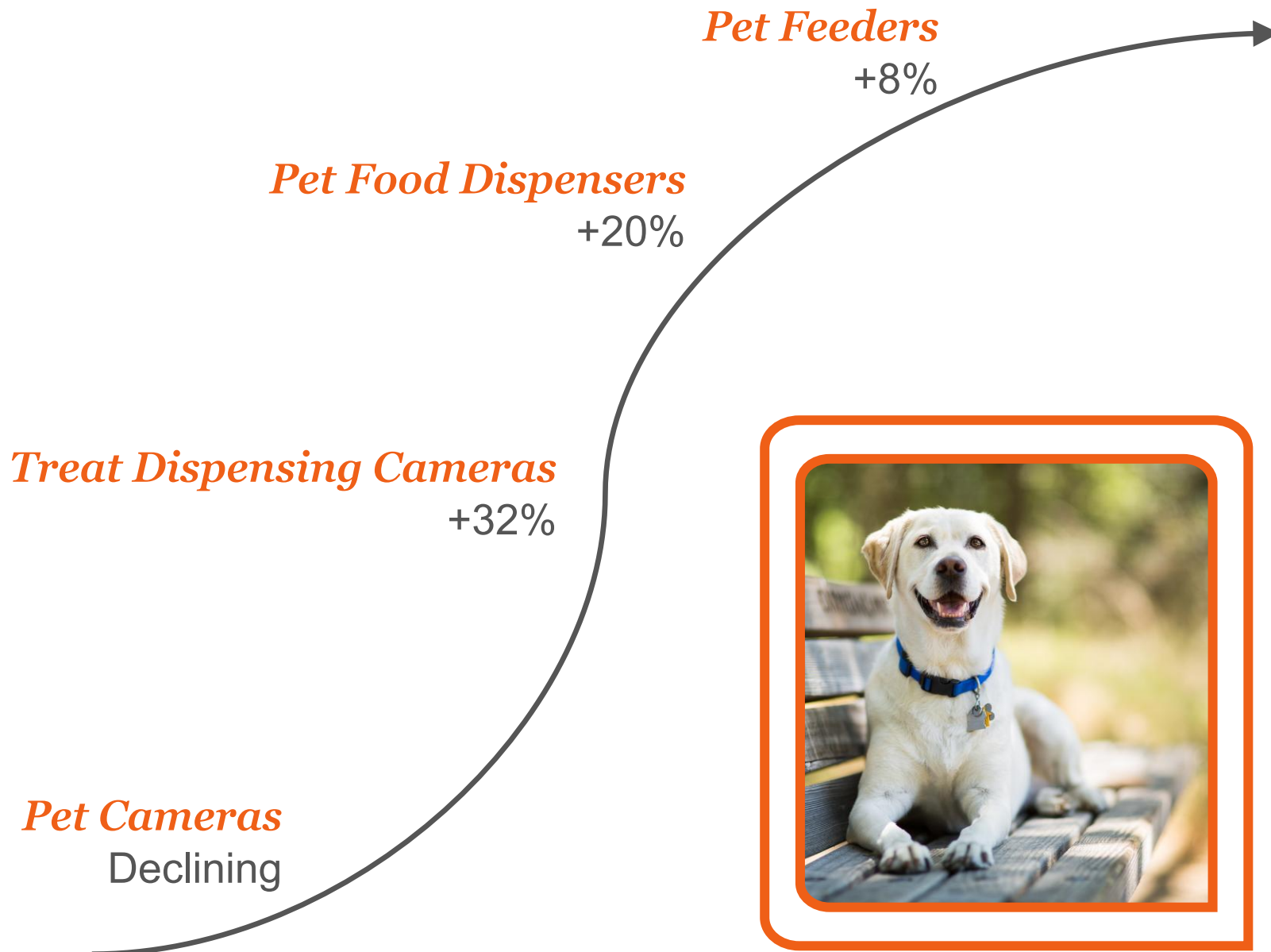
Year-over-year dollar growth for Pet Treat Makers



Source: NIQ BASES Quick Question Survey, January 2026
NielsenIQ Retail Measurement Data, US NIQ Total Store – 444 – Weekly, Total US Pet Retail Plus, 52 Weeks Ending 06/27/26.

#10

Connected Pet Care



Source: NielsenIQ Retail Measurement Data, US NIQ Total Store – 444 – Weekly, Total US Pet Retail Plus, 52 Weeks Ending 06/27/26

Let's hit the New Product Showcase to see these trends in action!



Meet at the entrance to the New Product Showcase at 10:30!



Thank you!

Come visit us at Booth #11268

Near the Emerging Brands section

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NielsenIQ



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