



# Where Consumers Shop for Pet Care

August 2023

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## INDUSTRY SNAPSHOT

Pet care sees growth normalise following pandemic boom

Focus on pet health and wellbeing drives category growth

Stronger growth observed in developing economies

## CHANNEL SHIFTS

Retail e-commerce continues to expand; registers stronger growth

Asia Pacific leads share of e-commerce sales; Latin America rallies from a smaller base

E-commerce platforms support channel growth but retail offline remains key

Strategies to drive in-store traffic

Offline retail strategies in action

## STORE-BASED CHANNELS

Speciality channel contributes the most to retail offline

Grocery retailers retain lead despite losing share over review period

Pet specialists benefit from specialised services and wide array of offerings

US pet specialist retailers lead global ranks

Petco's offline expansion strategy ranges from retailing partnerships to new store formats

Grocery retailers being challenged by specialists and online channels

Walmart maintains its lead across global grocery retailers

Premiumisation challenges the appeal of private label

Developed regions command lion's share of private label offerings

Increasing cost-of-living pressures push consumers towards more affordable alternates

## NON-STORE CHANNELS

Pandemic-induced habits drive continued growth of retail e-commerce

Normalising but continued growth for retail e-commerce

Continued growth for e-commerce across pet care categories

Growth momentum gives rise to new business opportunities

Players tap into subscription plans built around fresh pet food

Emerging regions seeing growing investment in online expansion

Emerging e-commerce platforms expand opportunities for the channel

Digital engagement the way forward

## FUTURE DEVELOPMENTS

Pet humanisation the underlying driver of growth in pet care

Stronger growth forecast for pet care e-commerce

Retailing strategies need to incorporate the best of offline and online

Leverage the advantages of an omnichannel presence

Key findings

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