

IMP

The Global Petfood Industry

Growth, Complexity, and the Race for Market Share

in the Age of Premiumisation

Industry Intelligence White Paper

Market Intelligence

Premiumisation & Pet Health

Packaging & Innovation

B2B Communication Strategy

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Contents

01	Executive Summary	3
02	A Market Defined by Structural Growth: Five Years in Review	4
03	The Global Map: Regional Dynamics and Untapped Potential	5
04	Premiumisation and Pet Humanisation: The Central Growth Engine	6
05	Pet Health, Supplements, and the Pharma Convergence	7
06	Packaging as a Competitive Dimension	8
07	Geopolitical Risk and Supply Chain Complexity	9
08	AI in the Petfood Industry: From Formulation to Consumer Relationship	10
09	The European Blind Spot: Opportunity and Complacency	11
10	The B2B Communication Failure and How to Correct It	12
11	Outlook to 2030 and Beyond	15
12	Recommendations	16

01

Executive Summary



The petfood industry is no longer a niche category defined by commodity kibble and canned meat. It is a global consumer goods and life sciences sector, valued in excess of \$130 billion, growing faster than most food categories, and increasingly defined by the same forces shaping premium human nutrition: personalisation, preventive health, ingredient transparency, and digital commerce.

— IMP Industry Intelligence

The global petfood market — conservatively valued at approximately \$128–132 billion in 2024–2025 — is on a trajectory toward \$170–195B by 2030 across most industry forecasts, with some long-range projections exceeding \$220B., depending on methodology, with compound annual growth rates across credible forecasters ranging from 6.1% to 8.5%. This is not marginal growth: it represents one of the most robust expansion stories in the consumer goods sector, driven by structural forces that are not cyclical — rising pet ownership across emerging markets, the generational shift toward 'pet parenthood' among millennials and Gen Z, and an accelerating convergence between petfood and veterinary science.

Yet despite this scale and momentum, the industry — especially in Europe — is characterised by a significant and persistent communication gap. Many European petfood producers, ingredients suppliers, packaging converters, and technology providers continue to operate with marketing strategies built for a different era: a trade show appearance, a product brochure, and occasional advertising in specialist media. This paper argues that this approach is not merely sub-optimal — it is structurally incompatible with the competitive dynamics of the global petfood market in 2025 and beyond.

~\$130B

global petfood market
value in 2025
(FMI / Grand View, 2025)

6–8.5%

consensus CAGR range
to 2030 across major
research providers

\$57.3B

European petfood
market in 2025, growing
at ~5.6% CAGR to 2030

Sources: *Future Market Insights (2025); Grand View Research (2025); Mordor Intelligence (2025); Allied Market Research (2025)*
Europe's petfood retail market exceeds \$55B, while manufacturer sales reported by FEDIAF are ~€31B, reflecting a narrower measurement scope.

- 1 The five years from 2020 to 2025 were transformative: pandemic-driven pet adoption created a structural demand uplift, while premiumisation accelerated across every regional market, changing the competitive basis from price to value, health credentials, and brand trust.

Asia-Pacific — and China in particular — represents the most significant growth opportunity, with China's petfood market projected to grow at 7–10% CAGR to 2030.
- 2 European producers and B2B suppliers serving the industry have been slow to build the market presence, regulatory understanding, and communication capability required to compete effectively in Asia.

The overlap between petfood and pharmaceutical/nutraceutical industries is deepening: pet dietary supplements are a \$3–5 billion market growing at ~9% CAGR, veterinary diets are the fastest-growing category in Europe, and packaging requirements for pet health products are converging with pharma-grade standards.
- 3 AI is reshaping petfood from formulation to consumer relationship — personalised nutrition, predictive health monitoring, and AI-driven manufacturing optimisation are transitioning from innovation pilots to standard practice among the leading global players.
- 4 The B2B communication gap in the petfood industry is structural and widening. One of the most influential global knowledge platforms in the petfood industry remains Petfood Industry and the Petfood Forum ecosystem. — Petfood Industry and its Petfood Forum events — remains underutilised by European suppliers and producers who need to compete on a global stage.
- 5

02

A Market Defined by Structural Growth: Five Years in Review

The global petfood industry entered 2020 with strong momentum and exited 2025 with structural change. The COVID-19 pandemic was the most acute catalyst: lockdowns triggered a global surge in pet adoption, as millions of households acquired animals for companionship in isolation. What began as a crisis-driven behaviour has persisted — pet populations across North America, Europe, and Asia-Pacific remained elevated through the mid-2020s, creating a sustained demand base that had not existed before.

Market value growth has been consistent and robust. From approximately \$103 billion in 2023 (Grand View Research), the market moved to an estimated \$128–132 billion in 2024–2025, representing cumulative growth of 24–28% in just two years across the reporting base of major research providers. Consensus forecasts project \$185–247 billion by 2030 at CAGRs of 6–8.5%.

Key Structural Shifts 2020–2025

01 Pet adoption surge and sustained ownership

Pandemic-era pet adoption created a structural uplift in the pet population that persisted beyond the emergency period. American Pet Products Association data indicates total US pet industry expenditure reached \$152 billion in 2024, with 2025 projections at \$157 billion. In Europe, FEDIAF's 2025 report confirms 139 million European households — equivalent to 49% of all households — now own a companion animal. This demographic has not reversed.

02 Premiumisation as the dominant value driver

The shift from economy and standard-tier to premium and super-premium petfood has been the most significant category dynamic of the period. Premium pet food grew at approximately 8% CAGR in 2020–2025 while overall volume growth was more modest. Consumers — particularly millennials and Gen Z, who constitute the majority of new pet owners — consistently demonstrate willingness to pay for ingredients, health claims, and values (sustainability, transparency, welfare) that they would apply to their own food choices.

03 E-commerce transformation

Online channels became structurally dominant for a significant share of petfood purchases. In China, e-commerce already accounts for 59.8% of pet food sales in 2024 (Mordor Intelligence) and is growing at 10% CAGR through 2030. In the US, online subscription models from Direct-to-Consumer brands (Ollie, The Farmer's Dog, Spot & Tango) demonstrated that digitally-native petfood companies could build significant market positions outside traditional retail distribution. European e-commerce adoption has been slower but is accelerating.

04 Consolidation at scale

Major M&A activity reshaped the competitive landscape: Mars Petcare acquired Champion Petfoods (ORIJEN, ACANA brands) in February 2023 for approximately \$1 billion — a direct investment in ultra-premium positioning. General Mills acquired Whitebridge Pet Brands for \$1.45 billion in November 2024. JBT Corporation acquired Marel in January 2025, integrating processing and packaging technology. The consolidation trend is compressing the competitive space for mid-market producers while creating premium niches where differentiated specialists can compete effectively.

05

Alternative and novel proteins

Insect protein, cell-cultured meat, and fermentation-derived proteins transitioned from concept to commercial reality. In February 2025, Pets at Home launched Chick Bites dog treats made with lab-grown chicken meat from Meatly. In April 2025, BioCraft Pet Nutrition and Prefera Petfood launched Europe's first cat food made almost entirely from cultured mouse meat. In March 2025, Marsapet and Calysta launched MicroBell — the first dry dog kibble made with FeedKind, a methane-fermentation protein. These are not fringe products: they signal a structural shift in the protein supply chain that will affect ingredient sourcing, formulation, and packaging across the industry.

03

The Global Map: Regional Dynamics and Untapped Potential

The global petfood market is structurally uneven — North America dominates by value, Asia-Pacific leads by growth rate, and Europe holds a significant mature market with underappreciated export potential. Latin America and the Middle East represent the emerging frontier. For European producers and B2B suppliers currently focused primarily on their home continent, this distribution represents an opportunity map that most have not yet begun to navigate systematically.

Regional Market Position and Growth Index (Base: Western Europe = 100)



Growth index to 2030, Western Europe = 100. North America leads in absolute value; Asia-Pacific leads in growth rate. Sources: Mordor Intelligence (2025); Arizton (2025); Grand View Research (2025); Knowledge Sourcing (2025)

North America — Mature, Premium-Dominant, Digitally Advanced

North America accounts for approximately 40–43% of global petfood value. The US alone sees over 65% of households owning pets, with total industry expenditure projected at \$157 billion in 2025 (APPA). The defining characteristics of the North American market are ultra-premiumisation, subscription DTC models, and early adoption of veterinary diets, personalised nutrition, and AI-enabled pet health monitoring. This is where the global market is heading — North American trends typically precede European and Asian market development by three to five years.

Asia-Pacific — The Decisive Growth Battleground

Asia-Pacific petfood value reached \$30 billion in total pet care sales as of late 2025 (Euromonitor), making it the third-largest region by value but the fastest-growing by far. China's petfood market alone — estimated at \$12.7 billion in 2025 — is projected to reach \$19–21 billion by 2030 at CAGRs ranging from 7.3% (Grand View Research) to 10.25% (Mordor Intelligence). Online channels already account for nearly 60% of Chinese pet food sales; domestic brands are gaining rapidly in the mid-tier; and international premium brands — particularly US-origin and European-origin — command significant price premiums at the high end. China's projected pet population of 300 million by 2035, driven by urbanisation, 'silver generation' ownership, and Gen Z pet parenthood, makes it the most consequential single market development of the coming decade.

Europe — Significant Market, Muted Global Ambition

Europe accounts for approximately 30% of global petfood consumption by value (FEDIAF), with a market size ranging from \$36–58 billion in 2025 depending on the reporting scope. FEDIAF's 2025 data confirms 340 million pets across European households, with Germany and the UK leading in dog and cat populations respectively. The European market is growing at 4–5.6% CAGR to 2030, driven by premiumisation, veterinary diet adoption, and nutraceutical growth (8.2% CAGR for supplements in Europe, Mordor Intelligence 2025). What Europe lacks is outward ambition: the vast majority of European petfood producers and B2B suppliers orient their strategy, their communication, and their commercial investment toward their home market, largely ignoring the faster-growing global opportunity.

04

Premiumisation and Pet Humanisation: The Central Growth Engine

The single most important structural dynamic in the global petfood market is the convergence of pet humanisation and premiumisation. Pet humanisation — the cultural shift in which pets are treated as family members, and in many cases as children or companion beings whose wellbeing carries the same emotional weight as a human family member's — is not a trend; it is a generational value shift that has reshaped purchasing behaviour across every major market.



More than one-third of dog and cat owners across 20 markets consider pets 'the most important thing in their lives', with Generation Z (45%) and millennials (40%) leading this trend.

— Mars Petcare Global Survey, 2024

The commercial consequence of pet humanisation is premiumisation at scale. Premium pet food commands price premiums of 40–60% over conventional alternatives (Mordor Intelligence, 2025) and is growing at approximately 8% CAGR globally. The premium segment is now mainstream — not a niche. Consumers are applying the same ingredient scrutiny, health claims evaluation, and ethical sourcing concerns to their pets' nutrition that they apply to their own food. Clean-label, grain-free, high-protein, organic, and functional ingredients (probiotics, omega-3, collagen, adaptogens) are no longer differentiators — they are table stakes in the premium tier.

In China, premium formats expanded 18–22% in 2024 as owners traded up, with human-grade and functional formulas commanding premiums of 40–60% over standard kibble (Mordor Intelligence / Shanghai Consumer Research Institute, 2024). In South Korea, sales of pet strollers surpassed baby strollers in 2023 — a cultural signal of the depth of the pet humanisation shift. In Europe, the share of single-person households — the fastest-growing pet-owning demographic — reached 41.4% of all households in 2024 (Eurostat), creating sustained demand for high-quality, emotionally resonant petfood brands.

The Premiumisation Opportunity Stack

Tier	Product Characteristics	Price Positioning	Growth Dynamic
Ultra-Premium	Human-grade ingredients, fresh/raw, breed-specific, personalised formulas	+100–200% vs. standard	10–15% CAGR; DTC dominant
Premium	High-protein, grain-free, organic, functional claims (probiotic, joint support)	+40–60% vs. standard	~8% CAGR; specialty retail & online
Super-Premium Therapeutic	Veterinary-prescribed or endorsed, condition-specific (renal, orthopaedic, GI)	Vet channel pricing	7.4% CAGR; vet channel growth
Mainstream Premium	Natural, no artificial additives, life-stage specific	+15–30% vs. economy	3–5% CAGR; broadest volume
Economy / Value	Mass-market, private label, convenience-driven	Baseline reference	Flat/declining in mature markets

Sources: Mordor Intelligence (2025); Arizton (2025); Knowledge Sourcing (2025); Grand View Research (2025)

05

Pet Health, Supplements, and the Pharma Convergence

The fastest-growing segment of the global petfood market is not food at all in the traditional sense: it is the convergence between nutrition, preventive health, and veterinary medicine. Pet dietary supplements are a \$3–5 billion market (depending on scope) growing at 7–9.4% CAGR through 2030 and beyond (Grand View Research, Precedence Research, MarketsandMarkets, 2025). This rate substantially outpaces overall petfood market growth. More importantly, it signals a structural realignment: petfood is increasingly a health intervention, not just a feeding solution.

According to a Chewy analysis published in August 2025, 33% of dogs and cats in the US now receive dietary supplements or nutraceuticals annually. APPA data from June 2025 confirms that 53% of US dog owners provided vitamins and supplements to their pets in 2024, up 6% year-on-year. This shift mirrors the broader human wellness trend — and the same consumer segment (millennials, Gen Z) driving petfood premiumisation is equally engaged in preventive pet healthcare.

The Pet Health and Wellness Opportunity Map

Category	2025 Market Size	Key Driver	Pharma Overlap	CAGR
Dietary supplements / nutraceuticals	\$3–5bn	Pet humanisation, preventive care, ageing pet population	Elanco, Zoetis, Virbac entering OTC supplement channel	7–9.4%
Veterinary / therapeutic diets	Fastest-growing EU category	Vet channel growth, condition-specific nutrition	Royal Canin, Hill's Prescription Diet — direct pharma distribution parallels	7–8.3%
Functional ingredients (probiotic, omega, collagen)	Part of premium mainstream	Consumer wellness transfer from human nutrition	Human supplement industry crossover — same ingredient manufacturers	8–10%
Pet pharma / prescription diets	Part of \$61bn animal therapeutics	GLP-1 adjacency, oncology, biologics for pets	Direct pharma manufacturing infrastructure — aseptic, cold chain, traceability	5.9%
Pet insurance (funding premium health)	\$3bn+ globally and growing rapidly	Vet cost escalation, premium pet ownership	Insurance infrastructure enabling high-cost veterinary treatment	10%+

Sources: Grand View Research (2025); Precedence Research (2025); MarketsandMarkets (2025); BCC Research (2025); Chewy Analysis (August 2025); APPA (June 2025); Fortune Business Insights (2025)

The Packaging Implication of the Pharma Convergence

As petfood moves into pet health territory, packaging requirements converge with pharmaceutical standards. Supplement chews, liquid supplements, and veterinary diets require barrier packaging that meets food contact safety standards, PFAS-free compliance, and increasingly, tamper-evident and child-resistant formats. Pet health product packaging must communicate clinical credibility — not just appetite appeal. This creates direct demand overlap with the flexible packaging industry and represents a specific growth opportunity for converters and packaging technology providers that can demonstrate pharma-adjacent capability.

Packaging as a Competitive Dimension

The global petfood packaging market was valued at approximately \$11.4–12.3 billion in 2025 and is projected to reach \$15–20 billion by 2030–2031 at CAGRs of 5.6–7.1% (Global Market Insights, Fortune Business Insights, SNS Insider, 2025). Packaging is not a commodity decision in petfood: it is one of the primary communication surfaces through which premium credentials, health claims, ingredient transparency, and brand values are communicated to pet owners at point of purchase and online.

Flexible packaging dominates the format landscape, accounting for 38.45% of market share in 2025, with pouches — stand-up, flat-bottom, and resealable formats — the fastest-growing segment at 7.15% CAGR through 2033 (SNS Insider). The petfood packaging market faces the same sustainability transition pressure as food packaging generally: the EU PPWR (effective 12 August 2026) requires recyclability of all packaging formats, and major petfood brand owners — Mars, Nestlé Purina, Hill's — have all committed to recyclable or compostable packaging across their portfolios.

■ Stand-Up Pouches and Flexible Films

Stand-up pouches are the fastest-growing petfood packaging format, particularly for wet food, treats, and single-serve portions. They drive premiumisation — high-quality gravure and flexographic printing enables rich colour, appetite appeal, and clean-label callouts. The PPWR challenge: most current stand-up pouches for petfood use multi-material laminates that are not recyclable. Converters providing mono-material PE or PP alternatives with equivalent barrier properties — including fat and moisture resistance essential for petfood — are in a structurally strong position. The Mondi / Fressnapf collaboration (2023), which converted dry petfood packaging to mono-material recyclable stand-up pouches and flat-bottom bags, is an industry benchmark.

■ Paper-Based Packaging

Paper and paper-hybrid packaging is gaining share in petfood, driven by consumer perception of sustainability and PPWR pressure. Dry petfood in paper block-bottom bags and paper-composite pouches is a growing format, particularly in premium and organic segments. The technical challenge is identical to food packaging generally: moisture sensitivity, food safety barrier requirements, and compatibility with existing filling lines. The 'paperisation' trend in petfood packaging mirrors broader food packaging development and creates specific demand for converters with validated paper-based solutions for dry food applications.

■ Smart and Connected Packaging

QR codes and digital links on petfood packaging are transitioning from novelty to expectation. Consumers use them to verify ingredient sourcing, access nutrition calculators, connect to subscription services, and validate sustainability claims. GS1 Digital Link 2D barcodes — replacing conventional UPC codes from 2027 in the US — will enable petfood packaging to carry real-time product information. For premium and health-focused petfood brands, smart packaging features are part of the brand experience architecture.

■ **Pharmaceutical-Grade Standards for Pet Health Products**

Supplement pouches, veterinary diet packaging, and prescription pet food formats are increasingly required to meet food-contact safety standards equivalent to pharmaceutical packaging. PFAS-free declarations, migration testing, and child-resistant packaging requirements are coming from both regulatory frameworks and retailer specifications. Converters and packaging technology providers with demonstrable capability in these standards — and who can document them proactively — are positioned to capture the fastest-growing packaging segment in petfood.

Geopolitical Risk and Supply Chain Complexity

The global petfood industry is significantly exposed to geopolitical risk — more so than its consumer goods positioning might suggest. Ingredient sourcing is globally distributed: animal proteins, grains, fish meals, vitamins, and functional ingredients routinely cross multiple borders before entering a finished petfood formula. Trade policy shifts, tariff escalation, and supply chain disruption can directly and immediately affect input costs, margin structures, and the availability of critical components.

US-China Trade Dynamics

The US maintains 25% tariffs on Chinese pet food ingredients, raising production costs for manufacturers dependent on Chinese supply chains. US pet food exports to China reached a record \$296.6 million in 2024 (USDA) despite a 10.4% decline in total Chinese pet food imports in early 2025, driven by competition from increasingly capable domestic Chinese brands and GACC tariff adjustments effective January 2025. European exporters to China face a different but comparably complex regulatory and tariff landscape that most have not fully mapped.

EU Carbon Tax and Regulatory Pressure

The EU's Carbon Border Adjustment Mechanism (effective 2026) creates pricing pressure on non-sustainable imports. Combined with PPWR's recyclability mandates and Green Deal ingredient-sourcing requirements (alternative proteins, reduced carbon footprint), European petfood manufacturers face a dual regulatory burden: meeting domestic standards while competing with producers in markets with less stringent requirements. The EU Green Deal is simultaneously a cost driver and a competitive positioning opportunity for companies that invest in compliance ahead of mandatory deadlines.

Raw Material Volatility

Protein ingredient costs — chicken, fish, lamb, novel proteins — have been volatile since 2021, driven by post-pandemic supply chain disruption, energy cost escalation, and climate-related agricultural stress. Fish meal prices remain historically elevated. The rise of alternative and novel proteins (insect, fermented, cell-cultured) is partly a response to this volatility. For European petfood manufacturers, ingredient cost management is now a strategic function, not a procurement task.

Regulatory Divergence Across Export Markets

European petfood producers targeting global markets must navigate regulatory frameworks that differ substantially by geography: AAFCO standards in North America, GB standards in China, varied labelling requirements in Southeast Asia and the Middle East. Regulatory compliance capability — and the ability to communicate it to international buyers — is becoming a prerequisite for global market participation, not an afterthought.

08

AI in the Petfood Industry: From Formulation to Consumer Relationship

Artificial intelligence is moving through the petfood value chain — from ingredient sourcing and formulation optimisation to manufacturing process control, personalised nutrition, and AI-driven consumer engagement. According to Cascadia Capital's 2024 Pet Industry Overview, AI has immersed itself across every segment of the pet industry, including predictive health monitoring, virtual vet consultations, personalised nutrition plans, smart feeding solutions, and interactive pet care tools. The leading global petfood companies are investing heavily: Mars Petcare has indicated potential investment of \$1 billion over three years to expand digital and AI capability.



<p>Formulation Optimisation</p>	<p>AI systems optimise petfood recipes based on real-time ingredient costs, nutritional targets, palatability data, and sustainability parameters simultaneously — tasks that traditional linear programming approaches handle sequentially and less efficiently. Machine learning models trained on feeding trial data and health outcome records can propose formulations with predictive efficacy, reducing trial-and-error R&D cycles. This is already commercially deployed at the major petfood manufacturers and is beginning to reach mid-market producers through ingredient company partnerships.</p>
<p>Personalised Nutrition and the 'Feedback' Loop</p>	<p>DTC companies including Ollie are deploying AI-assisted LiDAR weight scanning and microbiome analysis to create genuinely individualised petfood recipes — and closing a data loop between feeding and measurable health outcomes. Ollie acquired DIG Labs specifically to build a 'direct data-led link between what we feed dogs and their health outcomes' through individual stool, weight, skin and coat, and dental data. This represents the consumer technology frontier of petfood and will become a category expectation among premium pet owners within 3–5 years.</p>
<p>AI in Manufacturing</p>	<p>Computer vision quality inspection, predictive maintenance, and AI-driven process optimisation are improving OEE, reducing waste, and enhancing product consistency in petfood manufacturing. AI-powered drying technologies preserve nutritional content while reducing energy consumption. Real-time monitoring across production lines allows parameter adjustment that human operators cannot achieve at equivalent speed or consistency. For European mid-market petfood producers and contract manufacturers, AI-enabled process optimisation is becoming a competitive requirement rather than an innovation investment.</p>

AI in B2B Marketing and Communication

AI is reshaping how petfood companies — and the B2B suppliers that serve them — build and execute marketing and communication strategies. AI content tools enable the production of expert-level technical content, compliance documentation, and audience-specific communication at scales and speeds previously requiring large marketing teams. But the strategic point is more important than the tactical: AI means that the barrier to producing high-quality, multi-channel, audience-specific content has dropped substantially. The companies that use this capability effectively — building structured content programmes rather than running occasional ads — will compound their market authority faster than at any previous point in the industry's history. This makes the historical excuse of 'we don't have the resources to do more than the trade fair and a few ads' structurally obsolete.

The European Blind Spot: Opportunity and Complacency



European petfood producers often have world-class ingredient quality, manufacturing precision, and regulatory compliance. What they frequently lack is the market intelligence, the export infrastructure, and the communication strategy to translate that quality into global market position.

— IMP Industry Analysis

Europe's petfood industry — \$57.3 billion in 2025, growing at 5.6% CAGR (Mordor Intelligence) — is a substantial and well-developed market. The FEDIAF 2025 report confirms a \$33.7 billion European pet food industry by sales value (citing 2023 data) produced by approximately 150 companies operating around 200 facilities. Germany leads as the largest national market; the UK and France follow. But within this structure, several characteristics define a structural under-performance relative to the global opportunity.

01

Home Market Orientation

The overwhelming majority of European petfood producers — particularly mid-market and specialist companies — are structured, staffed, and commercially oriented toward their home national market or at most the broader EU. Regulatory familiarity, distribution relationships, and trade show participation patterns all reinforce a continental horizon. The result: companies that have technically competitive products and ingredients are absent from the fastest-growing market (Asia-Pacific), invisible in the key global intelligence forums, and unknown to the professional buyers who are actively seeking European-quality petfood in markets like China, South Korea, and the Middle East.

02

The Trade Fair Trap

European petfood and ingredient suppliers have historically relied on trade fair participation — Interzoo, Zoomark, Anuga, and equivalent national events — as the primary mechanism for market engagement. This approach has two critical weaknesses in the current environment: it reaches the existing audience rather than building new ones, and it concentrates investment in a small number of high-cost moments rather than building year-round market presence and authority. The companies gaining ground globally are not running bigger stands at the same shows — they are building content platforms, industry authority, and digital market presence that make them findable, credible, and differentiated 365 days a year.

03

Absence from the Global Intelligence Platform

Petfood Industry and its Petfood Forum events. Petfood Industry is the publication of record for the global petfood professional community; Petfood Forum (held annually in the US, with regional editions including Petfood Forum Asia and Petfood Forum Europe) is where the industry's thinking is shaped, partnerships are formed, and market intelligence is built. European companies are significantly underrepresented in this ecosystem relative to their market position. Other specialist media (All Petfood, Global Pets, Pet Food Processing, Pet Worldwide, Petfood Pro, WATTAgNet) offer additional reach.

04

Communication That Does Not Reach Its Audience

When European petfood and B2B suppliers do invest in communication, it is frequently misaligned: product-feature advertising in trade publications that are seen only by existing customers, corporate websites that communicate general capability without addressing specific buyer concerns, and exhibition presence without year-round follow-through. The buyers at premium petfood brands who specify ingredients, packaging, or processing technology are not making decisions based on trade advertising alone — they are evaluating technical content, health and regulatory expertise, sustainability credentials, and supply chain resilience. European companies that communicate in the language of their buyers' actual concerns — rather than their own product capabilities — are the exception, not the rule.

The B2B Communication Failure and How to Correct It

The petfood industry's B2B communication problem is specific, structural, and solvable. It is not a problem of investment level — many companies in the industry spend meaningfully on trade show presence, sponsorship, and advertising. The problem is a fundamental misalignment between what is being communicated, to whom, through which channels, and with what intent. The result is significant expenditure with marginal strategic impact.

The Old Model and Why It No Longer Works

The traditional petfood B2B communication model was built for a slower, less competitive, less information-rich market: exhibit at Interzoo or Zoomark every two years, advertise in the relevant trade publications before each show, send existing customers a product catalogue, and wait for inbound enquiries from prospects who found you in a directory. This model generated adequate results when the market was smaller, less global, and less competitive — and when buyers had fewer tools for independently researching and evaluating suppliers.

None of those conditions apply today. The buyers making significant ingredient, packaging, and technology decisions for premium petfood brands are conducting structured supplier evaluation processes that begin online, weeks or months before any trade show contact. They are comparing multiple shortlisted suppliers across technical capability, regulatory credibility, sustainability credentials, and communication quality. They are influenced by content they encounter on LinkedIn, in specialist media, and through peer networks — not primarily through the contacts they collect at a stand. Running two ads in the lead-up to Interzoo and attending a single global event is not a communication strategy; it is a visibility investment with limited strategic value.

The Communication Gap in the Petfood B2B Market

What Petfood B2B Suppliers Communicate	What Professional Buyers Evaluate	The Gap
Product range and specifications	Technical performance on specific applications (texture, barrier, shelf life, palatability)	Application evidence missing — catalogue without context
Sustainability claims (recyclable, natural, organic)	PPWR compliance status, specific recyclability grade, supply chain transparency	Claims without proof: 'recyclable' without documentation is noise
Company history and production capacity	Supply chain resilience, ingredient sourcing map, geopolitical risk management	Risk management capability invisible — no proactive disclosure
ISO certifications and quality credentials	Health and safety compliance for pet health segment (PFAS-free, migration data, vet-grade)	Generic quality credentials don't satisfy specialist pet health buyers
Trade show and event presence	Year-round accessibility of technical knowledge and regulatory expertise	Two-year event cycle creates 23 months of invisibility
Customer references and testimonials	Third-party validated data: feeding trials, performance testing, independent certification	Testimonials carry limited weight in science-based buying processes

Building a Communication Architecture That Works

Closing the petfood B2B communication gap requires a shift from event-centric, product-feature advertising toward a structured content architecture designed to build market authority, demonstrate expertise, and reach the relevant decision-making functions year-round. This architecture has four interlocking layers.

■ 1. Knowledge Leadership: The Foundation Layer

Knowledge leadership content — white papers, market analyses, expert commentary, regulatory briefings — is the content that builds credibility and awareness before any product or service is discussed. In the petfood industry, this means publishing meaningful analysis of regulatory changes (EU PPWR, AAFCO, China GACC), market trends (premiumisation, alternative proteins, personalised nutrition), and technical developments relevant to the buyer's actual business concerns. A European packaging converter that publishes a clear, practical analysis of how PPWR affects petfood packaging formats — before being asked — is demonstrating expertise and positioning as a knowledge partner, not a catalogue supplier. This is the layer where IMP's white paper model operates. It is also the content category most systematically neglected by European petfood industry suppliers.

Key Formats: White papers, market briefings, regulatory analyses, expert Q&A series, LinkedIn thought leadership

■ 2. Technical Evidence: Proving the Capability

Technical evidence content translates knowledge leadership into specific capability proof. Ingredient conversion studies with palatability and nutritional data. Packaging performance tests on sustainable substrates with barrier and shelf-life results. Processing case studies with yield and OEE data. This content is evaluated by R&D, quality, and operations functions who have the expertise to identify generic claims — and who will shortlist suppliers on the quality of the evidence. The most effective technical evidence includes not just results but the conditions, limitations, and methodology: specificity signals credibility.

Key Formats: Application case studies with data, substrate trial reports, formulation comparison studies, ingredient performance white papers, machine compatibility documentation

■ 3. Regulatory and Compliance Documentation

The petfood industry's regulatory burden is increasing across every dimension: PPWR for packaging, AAFCO and EU Regulation 767/2009 for petfood composition, PFAS restrictions, novel protein regulatory approval, and country-specific labelling requirements for export markets. Suppliers that proactively publish their compliance status — by product, by market, and by regulation — remove a significant friction point in the procurement and specification process. This means PPWR recyclability grade documentation for packaging products, PFAS-free declarations for food contact materials, and regulatory compliance summaries for key export markets for ingredient suppliers. This content type is the highest-leverage investment in reaching regulatory affairs and procurement functions at premium petfood brand owners.

Key Formats: PPWR compliance briefs, PFAS-free declarations, novel ingredient regulatory summaries, export market compliance guides, labelling requirement documentation by geography

■ 4. Petfood Forum and Global Platform Engagement

Petfood Forum (US) in April each year, Petfood Forum Asia, and Petfood Forum Europe bring together nutrition scientists, brand owners, ingredient and packaging suppliers, and equipment manufacturers at a depth and global scope that no other platform matches. For European companies seeking to build global market position — and particularly to establish credibility in the Asia-Pacific market — presence at and engagement with the Petfood Industry ecosystem is not optional; it is the most efficient single investment available. Beyond physical presence, digital engagement with Petfood Industry's content platform amplifies reach to the global audience year-round. Other specialist media — All Petfood, Global Pets, Pet Food Processing, Pet Worldwide, Petfood Pro, WATTAgNet — provide additional coverage, particularly for processing and manufacturing audiences.

Key Formats: Petfood Forum presentations and sponsored content, Petfood Industry authored articles and interviews, regional Petfood Forum editions (Asia, Europe), All Petfood and Pet Food Processing technical content

What AI Changes for B2B Marketing in Petfood

AI fundamentally changes the cost structure of high-quality B2B content production. The traditional argument — 'we don't have the resources to produce ongoing knowledge leadership content' — is no longer a valid constraint. AI-assisted content production, combined with genuine subject matter expertise, enables teams of modest size to maintain year-round publication calendars across multiple formats and audiences. AI can generate regulatory summaries, draft technical articles, create audience-specific messaging variants, and analyse which content is resonating with which functions at target accounts. The strategic implication: the advantage now belongs to companies that commit to a content architecture and deploy it consistently, not to the companies with the largest marketing budgets. This is the most significant competitive equaliser the petfood B2B marketing landscape has seen — and European mid-market companies are largely not yet using it.

Outlook to 2030 and Beyond

The global petfood industry in 2030 will look substantially different from today, but the direction of change is already clear. The structural forces of the past five years — pet humanisation, premiumisation, health-nutrition convergence, and digital commerce — will not reverse. What will change is the intensity of competition, the specificity of buyer requirements, and the sophistication of the consumer and professional market that everyone in the value chain is trying to reach.

Five Structural Predictions for 2030

01 Asia-Pacific becomes the global growth engine

China's pet population reaches 300 million by 2035. The Asia-Pacific petfood market grows to \$52–58 billion by 2030 at 7–9% CAGR. European companies that have not established market intelligence, regulatory understanding, and communication presence in Asian markets by 2027 will face a structurally more difficult entry point as domestic Asian brands consolidate mid-tier leadership and multinationals secure the premium tier.

02 Pet health becomes the defining category

Veterinary diets, supplements, and functional petfood collectively outpace conventional food growth. The pharma industry's investment in animal health — through established veterinary pharma companies (Elanco, Zoetis, Virbac) and through petfood channel convergence — will reshape the premium tier. By 2030, the distinction between 'petfood' and 'pet health nutrition' will be commercially blurred. Petfood companies that have not built the regulatory, scientific, and communication capability to operate in this convergent space will find their addressable market shrinking.

03 Packaging compliance becomes a market access requirement

PPWR application from August 2026 and further recyclability requirements from 2028 and 2030 will make compliant sustainable packaging a prerequisite for petfood market access in Europe. More significantly, as FMCG brand owners apply their European sustainability commitments globally, the same packaging standards will become de facto requirements for pet food exported into Europe and sold by European-origin brands in global markets. Petfood packaging converters without a clear PPWR compliance pathway will lose European petfood accounts from 2026.

04 Alternative proteins normalise

Insect-based, cell-cultured, and fermentation-derived proteins transition from premium novelty to commercially normalised segments within the petfood market. This reshapes the ingredient supply chain, changes formulation requirements, and creates new packaging challenges (novel textures, smell barrier requirements, claim communication) that are not solved by existing solutions.

05 AI creates winner-take-more dynamics

Companies deploying AI systematically across formulation, manufacturing, consumer personalisation, and marketing will compound market advantage faster than historical competitive dynamics allowed. The largest petfood conglomerates are already investing at scale (Mars Petcare's \$1 billion digital investment signal). For the mid-market, the democratisation of AI marketing and content tools creates an offsetting opportunity — but only for companies that recognise and act on it.

Recommendations

The following recommendations address the three categories of petfood industry participant for whom the strategic implications of this analysis are most acute. They are organised from the most foundational to the most specific.

For Petfood Producers and Brand Owners

- Audit your current communication strategy against a global competitive frame: are you visible to premium petfood buyers in Asia-Pacific? Are you represented in the global petfood knowledge ecosystem — Petfood Industry, Petfood Forum, the key trade platforms — at a level commensurate with your market ambition?
- Invest in knowledge leadership content before product advertising: a published analysis of how your ingredient choices, packaging solutions, or nutrition philosophy addresses the health and sustainability concerns of premium petfood buyers is worth more than ten product ads in the same media budget.
- Build a structured AI-enabled content production capability. The constraint of 'insufficient resources for ongoing content' is substantially reduced by AI-assisted production. Define your content architecture — regulatory expertise, nutritional science, sustainability credentials, application evidence — and build a year-round publication cadence.
- Map your regulatory exposure across all export markets, not just your home market. PPWR for packaging, AAFCO for North American export, GACC for China, and emerging regulations in Southeast Asia and the Middle East all require proactive compliance investment and communication.

For Ingredient, Packaging, and Technology Suppliers Serving Petfood

- Stop communicating in product features and start communicating in buyer concerns. The purchasing function of a premium petfood brand cares about supply chain resilience, PPWR compliance, and total cost of ownership. The R&D function cares about application performance data and regulatory status of novel ingredients. The sustainability function cares about PFAS-free declarations, recyclability grades, and LCA data. Build content that speaks specifically to each of these audiences.
- The Petfood Forum ecosystem is not just an event — it is the global intelligence platform of the petfood industry. Authored articles in Petfood Industry, participation in Petfood Forum educational sessions, and engagement with Petfood Industry's digital platform reach the most commercially relevant global petfood audience accessible to B2B suppliers. European companies are systematically underrepresented in this ecosystem relative to US and Asia-Pacific competitors.
- Develop explicit capability in pet health segment packaging and ingredients. The fastest-growing petfood segments are veterinary diets, supplements, and functional nutrition — all requiring pharma-adjacent capability in barrier packaging, food contact compliance, and regulatory documentation. Companies that proactively build and communicate this capability are positioning for the highest-margin growth opportunity in the petfood value chain.
- Deploy AI to close the content gap systematically: AI enables year-round publication of regulatory updates, application notes, sustainability content, and market intelligence at a fraction of the historical production cost. Use it to build the market presence and authority that a two-year event cycle cannot.

For B2B Marketing and Communication Planners in Petfood

→ Dismantle the trade fair as the organising principle of your annual communication plan. Events are one channel within a broader architecture — valuable for relationship building and direct engagement, but insufficient as a primary demand generation mechanism. Redesign the annual plan around a content calendar that operates 52 weeks a year, with events as amplification moments rather than primary touchpoints.

→ Build an audience matrix for your most important target accounts: which functions are making or influencing the decisions you need to influence? What are their core information needs — regulatory compliance, technical application data, supply chain resilience, innovation roadmaps? Build content that addresses each function specifically, rather than producing generic company-level messaging that is relevant to none of them deeply.

→ Measure communication effectiveness beyond event attendance and ad impressions. The relevant metrics are: which target accounts have engaged with which content? Which functions within those accounts are reading technical content? Where in the evaluation process is your content encountering prospects? These metrics require a structured content platform and CRM integration — but they are achievable and they change how marketing investment is justified and optimised.

→ Engage systematically with the Petfood Industry platform — not just as an advertiser, but as a knowledge contributor. Authored editorial in Petfood Industry, educational sessions at Petfood Forum, and technical commentary on market trends in All Petfood and Pet Food Processing build third-party credibility that advertising cannot replicate. This is the content that influences the market's perception of your company's expertise — and it compounds over time.

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About IMP InterMediaPartners

IMP InterMediaPartners GmbH specialises in B2B marketing and content strategy for complex industrial and technology markets — including petfood and pet care, pharmaceutical manufacturing, packaging, chemical R&D, and laboratory technology.

We help organisations translate technical expertise into market authority through structured demand architecture, knowledge-transfer content, and precision media deployment. This white paper is part of the IMP Industry Intelligence Series.

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