



2025 Insights Report

An inside look at the
future of pet nutrition





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Section 1:

Introduction

The pet product market is perpetually powered by caring pet owners who want what's best for their pet, and in 2025, health and wellness remains at the forefront of consumers' minds. Recent surveys show that consumers are expressing increased interest in pet longevity and products that host natural ingredients and functional benefits. This demonstrates a growing need for personalization in pet products, particularly those including functionality for longevity and gut health.

Overall, the pet nutrition industry continues to show strong growth, though that growth is slowing compared to pandemic-era levels. While consumers are still drawn to premium pet products, current economic uncertainty compels pet owners to seek cost-effective options that provide high quality nutrition and functionality for their beloved family pets. This shift in purchasing behavior creates a unique opportunity for pet brands and retailers to deliver cost-effective and innovative products to global pet owners.

Read on for more ADM insights that can help you achieve success in 2025.

73% of global pet owners state that they still prioritize fun items or treats despite rising prices.¹

Section 2:

Category growth

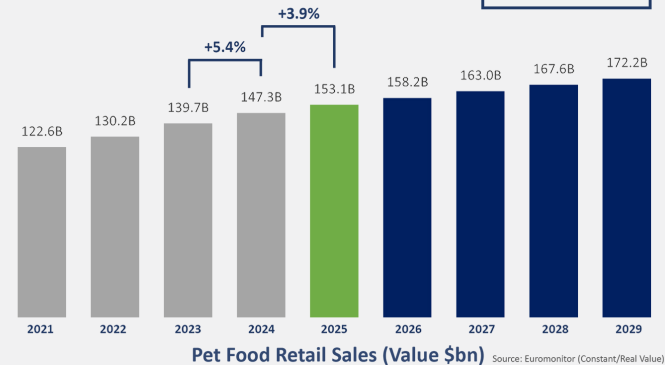
The historically resilient pet nutrition market shows slower but steady growth into 2025 with the latest forecast projecting a 3.9% increase in the global compound annual growth rate (CAGR) over last year. High prices, reduced spending, and lower adoption rates contribute to this slowing growth as consumers become more frugal while still prioritizing their pets' health and wellness.



Global Forecast

3.2% Compound Annual Growth Rate (CAGR)

2024-2029 CAGR
3.2%



Regional variations

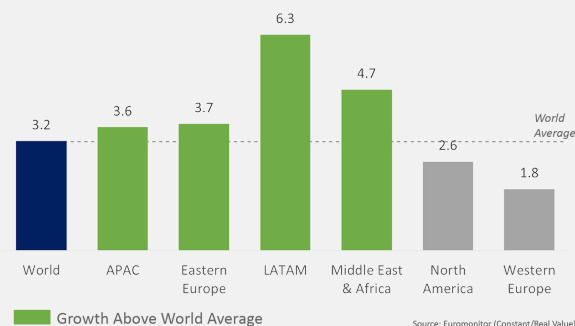
Updated market growth projections appear to vary widely by region. Euromonitor data shows below-world-average growth in North America and Western Europe through 2029, whereas, other regions are projected to have higher than world average growth. Latin America presents the highest growth opportunity as new brands enter the market and consumers show increased interest in health and wellness products for their pets.¹



91% of global pet owners consider their pets an important part of their family.¹

Market Growth Rates By Region
Capitalize On Consumer Demand

CAGR% 2024-2029



2025 growth opportunities:

- + Functional benefits that keep young pets happy and healthy into their senior years
- + High-quality and wholesome ingredients that pet parents can easily recognize
- + Personalized products formulated for specific breeds and life stages
- + Exploring alternative retail channels for discount-hungry consumers
- + Consumer education around proper pet nutrition and innovative ingredients
- + Focus on product claims like “minimally processed” and “all natural”





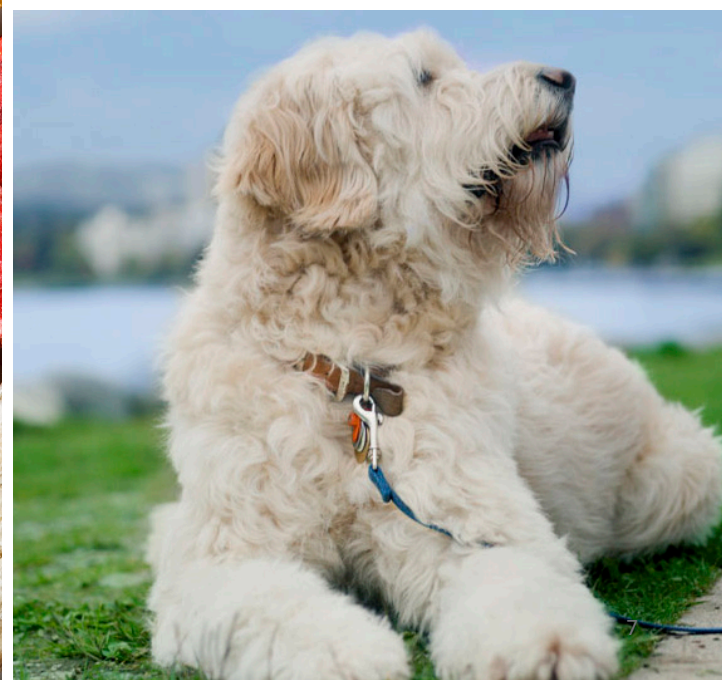
Section 3:

Lifelong vitality

Health and wellness are taking center stage as consumers are putting their pet's wellness and happiness before their own. When surveyed through proprietary ADM OutsideVoiceSM research, consumers' top two concerns about their pets were healthy aging and general wellness with 85% saying proper nutrition and supplements are as important for pets as they are for themselves. In 2025, pet brands should consider consumer concerns about pet longevity and craft solutions that are geared towards overall pet wellness to help pets live long and happy lives.

85% of pet owners say proper nutrition and supplements are as important for their pets as they are for themselves.¹

78% of global pet owners are interested in products that may help increase the lifespan of their pet.¹



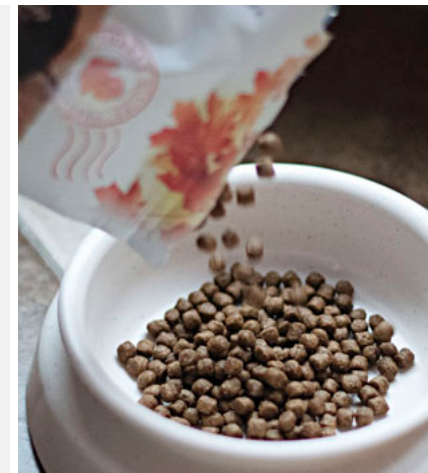
An all-natural interest

Consumers consider a range of factors when purchasing pet products, however, healthy and all-natural pet products are piquing the interest of owners. As pet humanization persists, consumers find that all-natural claims and minimally-processed products align closely with their current sentiment around processed human food. Not only are consumers searching for high-quality ingredients, they are looking for wholesome and sustainably sourced ingredients in the foods they feed their pets. Overall, pet brands should continue crafting science-backed products that cater to the health- and longevity-driven mindsets of pet parents.



46% of US pet owners ages 18-34 state that they prefer pet food that is labeled as all-natural.²

77% of US pet owners state that they are willing to pay more for healthier pet food.¹





Section 4:

Personalized optimization

Pet owners are searching for tailored solutions that cater to their individual pet's needs, and this “made for my pet” mindset follows similar trends in human products. ADM’s most recent OutsideVoiceSM research supports this by showing that global pet owners are looking for specific functionalities in the pet products they purchase, and their pet health concerns vary across regions.

90% of pet parents in Mexico state that they have purchased microbiome-supporting products at least once.¹

A regional distinction

When surveyed, approximately half of global pet owners state that they purchase pet health products every two months or more often. However, regional differences can influence purchasing habits. For example, a majority of US pet owners state that they are primarily interested in products that support healthy digestion, while pet parents in Brazil are overwhelmingly interested in immune-supporting supplements.¹ Pet companies can appeal to these global pet owners by embracing a personalized approach, ensuring that their products and services cater to the individual needs of pets.



85% of pet owners in Brazil ranked immunity as a primary health concern for their pets.¹



53% of US pet owners are interested in healthy digestion over other functional benefits.²



Section 5:

New value equation

With globally elevated prices and cautious consumer spending, some pet owners are looking for lower priced alternatives to their preferred pet products. While the desire to treat pets with the highest quality products remains unchanged, purchases of premium or sustainably sourced products have become a lower priority for consumers as they cut back on their spending. Surveyed consumers are willing to say that this cost-conscious spending is not temporary, and there is potential for a long-term shift in their purchasing habits.² In 2025, pet brands should focus on innovation to differentiate their products, build customer loyalty and hold on to market share.

The rise of private label

To satisfy the consumer demand for high-quality yet affordably-priced goods, global private label brands are increasing their launches of pet products to compete with higher-priced, name-brand products. According to Euromonitor, the share of pet owners who are planning to increase their visits to discount stores has increased from 29% to 35% over the last three years, indicating the growing importance of this retail channel.

Ultimately, pet brands should be aware of these changes to consumer spending habits in 2025 and adjust their product-development strategy accordingly.



46% of US pet owners state
that they'd be willing to consider
changing the type of pet food they
buy to save money.²

Section 6:

How ADM can help

Whether you want a reliable partner to help you develop a new product or you're looking for science-backed functional ingredients, ADM has the expertise and portfolio you need. Using our diverse team of formulation scientists and state-of-the-art facilities, we regularly help our partners bring new products to market. Our teams will monitor consumer trends, conduct scientific research, and use our expertise to help your pet brand succeed.

- + 140 scientists, technicians, and employees dedicated to animal nutrition
- + 13 Research & Development and applied research centers globally
- + A portfolio of patented biotics with scientifically verified efficacy and stability
- + Significant resources dedicated to supporting partners in the pet industry
- + Full integrated solutions that range from ingredients to turnkey products





Insights and expertise to advance innovation

ADM's 360-degree approach includes services, customer insights, and tailor-made solutions that enable us to help our partners move quickly from ideas to innovations, giving them a competitive advantage with today's pet parents. As a go-to partner for our customers, ADM's pet nutrition solutions help advance the role of foods, treats, and supplements as a way to strengthen the bond between pets and their owners.

Request a consultation today

800-775-3295 | petnutrition@adm.com | adm.com/petnutrition

¹Source: ADM Outside VoiceSM 2023 (22 countries)

²Source: Mintel – Pet Food US 2024

³Source: Mintel – The Future of Pet Food 2024

⁴Source: Mintel – America's Pet Owners 2024

⁵Source: Mintel – Patent Insights Revolutionize The Future Of Pet Food

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