



2026 Insights Report

An inside look at the
future of pet nutrition



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Section 1:

Introduction

The pet nutrition industry continued its steady growth over the past year, underscoring both the resilience of the category and the evolving expectations of modern pet owners. As companion animals become increasingly integrated into family life, consumers are scrutinizing the products they choose more closely than ever before. This year's insights reveal a market shaped by heightened awareness, shifting priorities, and demand for greater transparency across every segment of the value chain.

Within this landscape, three prominent consumer trends stand out. First, pet owners are moving away from ultra-processed foods, seeking options perceived as more natural, minimally processed, and nutritionally intact. Second, science-backed ingredients and formulations are gaining traction, with shoppers gravitating toward products supported by credible research and functional benefits. Finally, private label offerings are surging, especially those that pair premium quality with value-forward price points, creating new competitive dynamics across retail channels. Together, these trends signal not just where the industry is today, but where consumer influence is steering it in the years ahead.

Read on for more ADM insights that can help you achieve success in 2026.



Section 2:
Category growth

Globally, the pet nutrition category is poised for meaningful expansion, with forecasts projecting a 5.9% compound annual growth rate (CAGR) over the next five years.¹ This sustained momentum reflects rising pet ownership, increased spending on health-focused nutrition, and the continued premiumization of categories across both developed and emerging markets. As consumer expectations evolve and innovation accelerates, this steady global growth trajectory sets the stage for new opportunities and heightened competition throughout the industry.

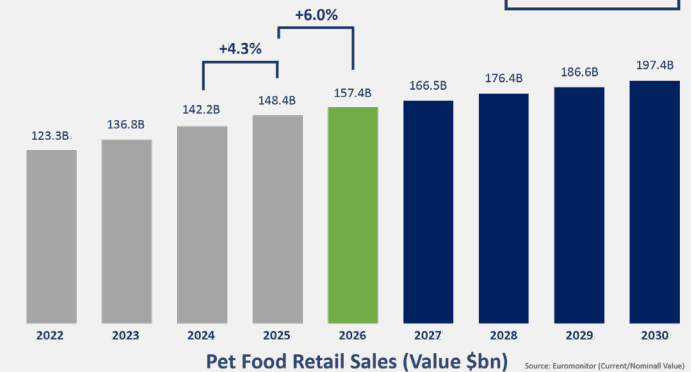
64% of global pet owners say they would cut back on some of their personal expenses before cutting back on pet food.²



Global Forecast

5.9% Compound Annual Growth Rate (CAGR)

2025-2030 CAGR
5.9%



Regional variations

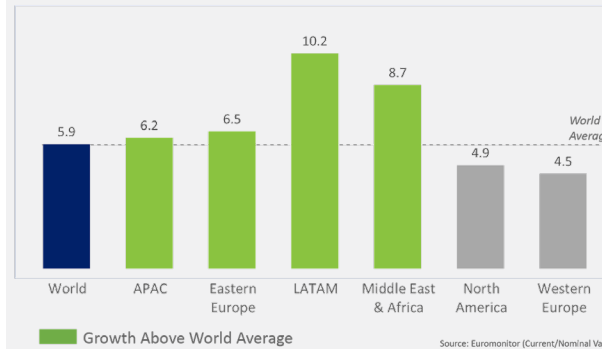
Regional performance continues to vary significantly, with Latin America once again outpacing all other markets. Forecasts show LATAM growing at an impressive 10.2% CAGR over the next five years,¹ driven by rising pet ownership, increased access to premium nutrition, and rapid channel expansion across key markets. In contrast, North America and Europe are experiencing more moderate but steady growth as their categories mature, while Asia Pacific remains a dynamic region with strong long-term potential. These diverging trajectories underscore the importance of region-specific strategies as global brands navigate varying consumer needs and economic environments.



72% of global dog owners say they take as much care of their pet's diet as their own.³

Market Growth Rates By Region
Capitalize On Consumer Demand

CAGR% 2025-2030





2026 growth opportunities:

- + Develop or reformulate minimally processed products that meet consumer needs
- + Increase transparency around ingredient sourcing and processing listed on product labels
- + Incorporate clinically supported functional ingredients such as postbiotics
- + Partner with veterinarians, nutritionists, and academic researchers to support claims
- + Leverage data and personalization to tailor nutrition solutions to specific health concerns
- + Optimize pack sizes, formats, and pricing strategies to target value-conscious consumers



Section 3:

Ultra-processed aversion

Pet owners increasingly project their own dietary priorities onto their pets, a hallmark of the broader humanization trend. Today, this is especially evident in the growing scrutiny of ingredient lists as consumers work to limit their exposure to ultra-processed foods (UPFs), and pet products are firmly in that spotlight. One key manifestation of this shift is the rising demand for minimally processed formats: 2025 saw strong growth in fresh, gently cooked, and raw-adjacent pet foods, alongside a noticeable increase in homemade pet meal preparation. These formats offer transparency and simplicity that resonate with owners wary of overly industrial food production.

67% of global pet owners often pay more for higher-quality pet food (organic, raw/dehydrated, wild, grass-fed, etc.)²



84% of global pet owners are interested in products that may help increase the lifespan of their pet.²



Simple, wholesome products

A second, closely related theme is consumers' heightened focus on recognizable, natural ingredients. According to the 2025 Innova Pet Owners Survey, 62% of global pet owners cite ingredient lists as the top reason for switching pet foods, and 64% seek to avoid artificial colorants and flavors.³ Regionally-specific trends are similarly prominent. In China, 80% of pet owners say natural/organic claims are very or somewhat important in their decision-making, compared to 60% of pet owners in France who feel the same.⁴ In 2026, pet brands should reassess their formulations with this shift in mind by integrating vegetables, whole-food inclusions, and plant-based proteins while phasing out UPF-associated components like artificial additives and certain preservatives. By simplifying recipes and communicating these changes clearly, brands can more effectively meet the expectations of ingredient-conscious shoppers who are redefining what "quality" means in pet nutrition.



Premium quality in pet food is the most influential purchase factor for global dog owners.³

88% of global dog owners are influenced by natural or clean label product claims.³





Section 4:

Science-backed ingredients

As consumers deepen their focus on pet wellness, scientifically-validated functionality will remain a central driver of purchasing decisions in 2026. Pet owners are increasingly seeking products that deliver measurable benefits, with a 2025 ADM Outside VoiceSM survey reporting that 77% of global pet parents would pay more for formulas featuring functional ingredients and 84% are interested in products that may support longer pet lifespans.² This growing appetite for wellness-enhancing solutions highlights a broad shift toward evidence-based nutrition, where consumers expect clear explanations of what each ingredient does and why it matters. In addition, global pet owners prefer to serve these ingredients to their pets in easy-to-feed formats such as biscuits/ kibble (84%), dental sticks (74%), and soft chews (72%), which are the pet wellness products owners are most likely to purchase.⁴



The educated consumer

Alongside this desire for functionality, a parallel theme is emerging: a heightened demand for transparency and scientific credibility. Pet owners are becoming more discerning and self-educated, scrutinizing ingredient lists, researching health claims, and seeking assurance that functional components have been validated for both safety and efficacy. Trust in branded ingredients is highest among pet owners in China, where 84% say they trust products with branded ingredients more than those with generic alternatives. This compares to 72% in Mexico, 67% in the United States, 63% in the UK, and 59% in France.⁴ To meet these expectations, pet brands should consider leveraging branded ingredients that come with established consumer recognition, documented clinical research, and substantiated claims. Incorporating clinically studied ingredients and clearly communicating their purpose will help brands build trust and differentiate in an increasingly science-savvy marketplace.

77% global pet owners say it's worth paying more for pet food featuring ingredients that provide functional benefits.²



84% of global dog owners are influenced by tracability of ingredients.³



62% of global dog owners say ingredient lists are the primary reason for switching pet food brand.³



Section 5:

Premium-ized value

Today's pet parents are navigating the tension between quality and affordability, seeking products that feel premium without straining their budgets. Quality of ingredients and pet enjoyment are critical drivers of pet health and wellness purchases among owners globally, more so than external factors such as price and brand reputation. Globally, pet enjoyment (89%) and quality of ingredients (88%) are the two most important factors in pet health and wellness purchasing decisions, with this importance noted particularly among Mexican owners (93% and 91% respectively). Price comes in as a secondary consideration, with over three-quarters (77%) of pet owners around the world indicating this as an important factor in their purchase decision.⁴ One major expression of this trend is the rise of value-forward premiumization, where consumers expect elevated nutrition, thoughtful ingredient choices, and upgraded packaging at attainable price points. Economic uncertainty has intensified this expectation, pushing shoppers to look beyond traditional "luxury" brands and instead evaluate which products deliver the most quality per dollar. As a result, the definition of "premium" is broadening, no longer tied solely to high price, but to perceived effectiveness, trustworthiness, and overall value.



Cost-effective quality

At the same time, private label premiumization has emerged as a powerful force reshaping the competitive landscape. Retailers are rapidly expanding their store-brand portfolios and launching premium-tier offerings that rival national brands in formulation, design, and performance. According to the 2025 Pet Trends report from Numerator, retailers such as Walmart and Dollar General are experiencing strong growth in private label pet sales, while Amazon purchases continue to climb as consumers seek the best deals across channels.⁵ Looking ahead to 2026, pet brands both national and retailer-owned should focus on delivering high-quality nutrition, transparent ingredient stories, and elevated packaging at accessible price points. Brands that successfully blend premium cues with affordability will be well positioned to win cost-conscious yet quality-driven pet owners.



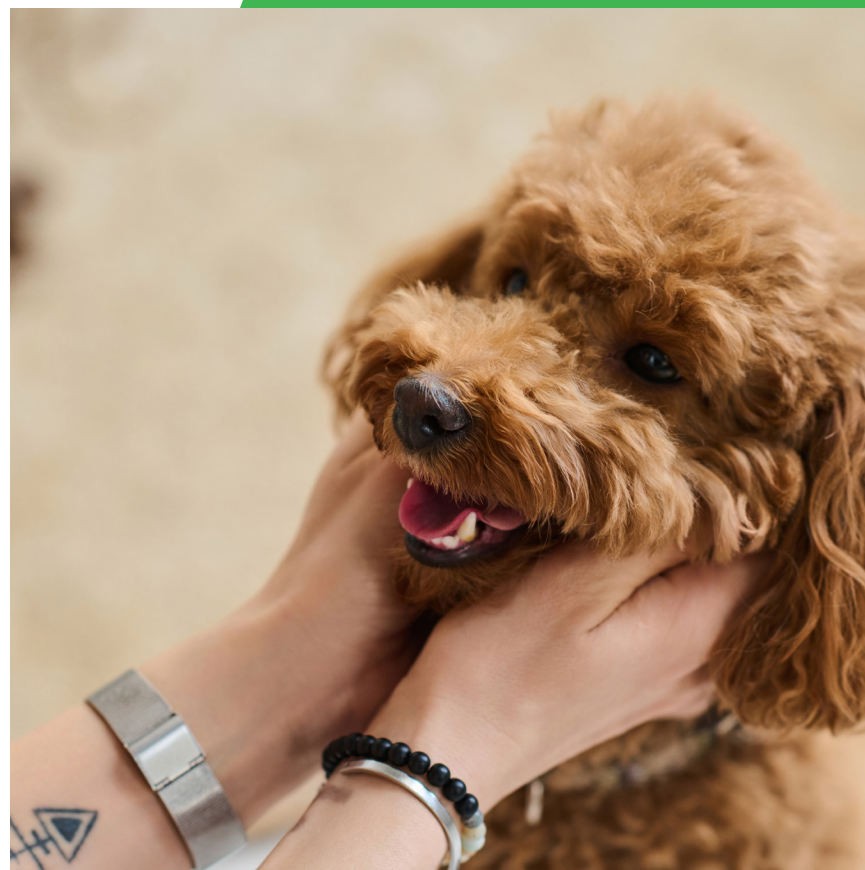
66% of global dog owners have tried a new pet food brand in the last 5 years.³

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 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

¹Euroonitor from trade sources/national statistics, February 2026

²ADM Outside VoiceSM Lifestyle Survey, 2025

³Innova Pet Owners Survey, 2025

⁴ADM Outside VoiceSM (proprietary research conducted via Morning Consult), 2025

⁵Numerator Pet Trends Report, 2025

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