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The Grocer Guide to...

The Grocer

Petcare



Analysis

Paws, reflect, spend

The wellbeing habits people have built for themselves have crossed over to their pets, reshaping the category



 Anyone who has stood behind a dog owner in a supermarket aisle, watching them squint at the back of a food pouch for a full five minutes, already knows something important about this market: pet owners don't cut corners. And that instinct to do right by their animals, regardless of what's happening in the wider economy, is exactly what makes the UK petcare market so resilient.

Back in 2024, however, the category had a rough year. The wave of pandemic pets had grown up, the inflationary shock of 2022 and 2023 had worked its way through household budgets, seeing the category slip by -1.1%¹. Shoppers were being careful, and some were cutting back. But by the end of 2025, the market had swung back to 1% growth². That may not sound dramatic, but in the context of

what the category had been through, it represented a significant shift.

Driving this recovery is a set of overlapping trends in how owners think about their pets, what they expect from the products they buy, and how much they're willing to invest in getting it right. Those choices are reshaping the category in ways that matter – from brands formulating products to retailers trying to organise their aisles.

People are spending, selectively

The category's performance in 2025 came with a clear internal split. Premium healthy products grew 3.9% in value³ while their more fundamental counterparts fell 3.2%⁴.

Shoppers weren't abandoning petcare; they were making more deliberate choices about where their

money was spent within the category.

“Premiumisation and humanisation trends continue to see shoppers increasingly prioritising high-quality nutrition and wellness-focused products, even in this challenging economic environment,” explains James Kennedy, sales director at Forthglade. Natural dog food sales, up 4.3% year-on-year⁵, reflect that appetite directly, he notes. For Forthglade, which became the “second-fastest growing brand in grocery over the past year among brands with over £10m in sales⁶”, the combination of natural credentials and accessible pricing has clearly hit a nerve.

Kennedy also cites a parallel trend. “We have also seen price-sensitive shoppers react strongly to larger ‘bigger bulk’ purchasing, a trend that has increased within the grocery channel,”



Contents

Analysis	2
Spectrum Brands	6
Forthglade Foods	7
Leading the charge in premium natural wet food	
Nestlé – Purina Petcare	8
Focusing on simple pleasures that support pets' everyday health	
Vetnique – Home of YuMOVE ..	10
Supporting wellbeing through accessible, science-led solutions	

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he explains. This, he adds, is evidence that even in a premium-leaning market, people are carefully analysing grocery spend, with price per kilo and value for money rising up the agenda.

Meanwhile, Vicky Bates, head of MDO, northern region at Purina, expects to see additional value growth continue to come from similar areas as in 2025 – namely premiumisation in the market through trade-up into higher-end products. “Whether this be due to increasing shopper demand for science-backed health benefits; natural, organic, sustainable and traceable ingredients and packaging; or a greater demand for engaging, exciting and innovative product formats, shoppers continually look to demand more from their pet food,” she says.

Cat snacks are one of the rapid emerging opportunities in the petcare

category, growing at 7.4% year-on-year⁷ with the highest five-year CAGR of 11%⁸, adds Bates. Wet dog food, meanwhile, has been quietly delivering a five-year CAGR of 9.6%⁹, second only to cat snacks.

The cost-of-living question

It would be easy to look at all that premium growth and conclude that the cost-of-living crisis simply hasn't touched petcare. However, that's not quite true. Owners are watching what they spend but they're applying a different logic to their pets than to other parts of the grocery shop. When it comes to food, toiletries or household products, trading down may feel easier. When it comes to one's pets, it's harder.

“In dog food, owners remain strongly committed to their pet's wellbeing they're not simply trading down,” says

Forthglade's Kennedy. “They're looking for the best balance of quality, natural and affordability. That's reflected in performance, too, with natural dog food sales up +4.3% year-on-year¹⁰.”

The job for brands, as he sees it, is to make sure that balance is genuinely available, not just theoretically on offer. That means real pricing and meaningful propositions that don't ask people to choose between their values and their budget.

At Vetnique, chief veterinary and innovation officer Courtney Miller says its Yumove brand offers a risk-free choice for shoppers who want reassurance that their money is well spent. “We're so confident in Yumove's performance that we offer a six-week money-back guarantee if owners don't see a visible difference,” she notes.

For a category where spending can

Analysis

feel like a leap of faith, taking the risk out of the purchase can make a difference.

Let's talk functional

The fastest-growing part of the petcare category right now is functional nutrition, the broad territory of toppers, supplements, mixers and products making specific health claims. "We have seen dog food follow human-style wellness trends historically, from gut health to immunity support, and this is an area of rapid acceleration within the category currently with functional supplements growing by +32% year-on-year¹¹," explains Forthglade's Kennedy. "We have seen strong growth in our functional soft bite treats alongside shopper demand for similar additions in dental and everyday meals," he adds. "We've also developed a range of functional bone broth toppers and calming dental sticks which will be launching this year, allowing owners to easily add a functional benefit to their daily routines."

At Purina, Bates notes: "Healthcare products within petcare nearly doubled their volume growth rate between 2024 and 2025, from 4.9% to 9.0%¹², with 45% of pet products launched in the UK in 2025¹³ having some sort of functional claim." None of this is entirely surprising if you've noticed how owners talk about their pets. The wellness vocabulary that people apply to their own lives gut health, mobility, immunity has migrated across to their animals.

In fact, Purina's research shows 76% of pet owners consider digestive health essential to their pet's overall wellbeing¹⁴, which sits behind the company's development of Edward Baker Dry, containing a natural probiotic proven to help digestive health and deliver nourishing nutrition from the inside out, adds Bates.

Hydration is another gap that owners hadn't thought about much until recently. New research commissioned by Purina found 78% of cat owners worry their cat isn't drinking enough water, with one in four of them thinking about it every single day. Purina One Hydralife, aims to alleviate these concerns. "Encouraging cats to drink water is never easy, as they are known to be naturally poor drinkers; even when provided with clean, fresh water every day," explains Bates.



Owners are increasingly focusing on proactive health support, with pet parents seeking to proactively manage their pets' long-term wellbeing rather than treating when problems arise, explains Becky Best, head of category at Vetnique. "Treat-like formats and recognisable 'hero' ingredients such as green-lipped mussel, pre-, pro- and post-biotics and seaweed are making

proactive care feel easier and more accessible for owners," she notes.

In the supplements and calming sector specifically, growth numbers are significant. "The segment is up £9.5m RSV year-on-year¹⁵," explains Best. "Awareness of Yumove now stands at 55.8% among UK dog-owning households and one in three owners has chosen it for joint support in the past year¹⁶ – reinforcing its leadership and trust within the category."

“Pet parents are increasingly prioritising their pets' wellbeing and happiness and are willing to invest in products that reflect their own values”

The bond at the heart of all of this

There's a straightforward explanation as to why owners keep spending on their pets, even when money is tight: they love them. That probably sounds obvious, but the data shows that "nearly half (42%) of pet parents say they worry about their dog's



habits where 85% of dog food shoppers pre-plan their purchases before entering the store¹⁹,” he says. “And you can understand why: within these fixtures retailers are trying to cater to over 13m different dogs, their eating habits across all meal occasions.”

Forthglade has been working with retailers on need-state navigation, organising the fixture around what owners are actually looking for rather than which brand has the biggest presence – and they are keen to do more of this in 2026.

“Retailers, in particular generalist retailers, are increasingly recognising that ‘pet’ is a category that can be used to draw shoppers into store, and are activating accordingly,” says Purina’s Bates. “Given baskets with pet products in are worth 2.2x more than those without, it is a critical category in a generalist retailer’s repertoire²⁰,” she adds.

This proves the category doesn’t just earn its margin, but actively brings people into the store. “Because the supplements sector is often mission-led, for those shoppers who are not on that mission, we’ve been working closely with retail partners to disrupt them and increase visibility of the category,” notes Emma Beynon, shopper marketing lead at Vetnique. “Initiatives such as secondary space with standout point-of-sale have proved effective in raising awareness, promoting discovery and helping pet owners understand the role supplements can play in everyday pet health.”

What owners still don’t know

Spend enough time talking to people in this industry, however, and one theme emerges repeatedly: there’s a significant gap between what the science shows and what the average owner actually understands.

One of the most persistent misconceptions, according to Fran Blake, veterinary technical manager at Vetnique, is that joint supplements are something you give an ageing dog. “Joint supplements aren’t just for older dogs; they can be given to dogs of all ages,” she says. Young dogs are energetic and enthusiastic, but their joints are still developing. Adult dogs have different mobility needs as they move through their active years. Older dogs are the obvious candidates for

support, but by that point some of the benefit has already been missed.

“The key is to find a product designed specifically for your dog’s age or mobility stage and keep in touch with your vet about what they would recommend,” adds Vetnique’s Blake. Yumove is making this easier through a new strength scale on its packaging, so choosing the right product becomes more instinctive at the shelf.

Purina’s equivalent challenge is around life-stage nutrition more broadly. It is estimated that over 50% of pets are aged seven or older²¹, yet only 6.3% of pet food volume sales in 2025²² came from products designed for that age group, explains Bates. “Feeding pets products tailored to their life stage is fundamental to ensure they get the right nutrients,” she says. A seven-year-old dog has meaningfully different needs from a two-year-old. Products to address that do exist – they’re just not reaching the people who need them just yet.

At Forthglade, Kennedy’s focus is on giving owners genuine confidence in the basics. The brand has partnered with practising vet Dr James Greenwood, nutritionist Lisa Hannaby-Aird and canine behaviourist Caroline Wilkinson to build out educational content covering everything from feeding to behaviour.

In 2026, the recovery in the petcare category is real, the underlying drivers are solid and there’s genuine innovation across food, supplements and healthcare. But what’s most striking about this market isn’t the growth figures, it’s the motivation behind them. People are spending on their pets because they care about them deeply. Brands that keep that in mind and build products and communications around it, rather than around category mechanics, will navigate the market with ease.

health more than their own¹⁷”, reveals Vetnique’s Best. “In fact, 59% follow a nutritional wellness and health routine for their dog similar to one they have for themselves¹⁸,” she adds. “The emotional bond between owners and their pets has never been stronger. Pet parents are increasingly prioritising their pets’ wellbeing and happiness, and they’re willing to invest in products that reflect their own values.”

Navigating the aisle

For all the genuine energy in the category, the shopping experience hasn’t always kept up. “Dog food is a difficult area for owners to shop, with a high number of brands, product terminology and a wide array of pack formats,” explains Forthglade’s Kennedy. “This is reflected in shopper

Sources

- ¹⁻⁴ Circana MA3.0, 52 w/e 27.12.25, pet food value sales
- ⁵ Circana, 52 w/e 27.12.25
- ⁶ Circana, 52 w/e 27.12.25 – based on brands over £10m in sales
- ⁷ Circana MA3.0, 52 w/e 27.12.25, pet food value sales by type/sub-category for snacks
- ⁸ Circana, MA3.0, 52 w/e 27.12.25
- ⁹ See 7
- ¹⁰ See 5
- ¹¹ Circana, 52 w/e 27.12.25
- ¹² Circana, MA3.0, 52 w/e 27.12.25
- ¹³ Mintel GNPD, January 2021– June 2025
- ¹⁴ Purina CMI, Petcare Trends 2025
- ¹⁵ Nielsen, 52 w/e 24.01.26
- ¹⁶ YuMOVE brand tracking study 2025
- ¹⁷ 2026 survey by 3Gem, Research and insights of 1,000 UK dog owners (self-reported data).
- ¹⁸ See 16
- ¹⁹ Kantar, March 2025
- ²⁰ Worldpanel by Numerator data, sourced 03.02.26
- ²¹ Purina, internal estimates
- ²² Circana, MA3.0, 52 w/e 27.12.25, pet food volume sales

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Growing its premium offering

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KEY PRODUCTS

Puppy, Adult and Senior Grain-Free Complete Meals and Wholegrain Complete Meals; Natural Dry Cold Pressed Complete Dog Food; Natural Lightly Baked Complete Dry Dog Food; Multi-Functional Soft Bite Treats; Meaty Treats; Supplements; Dental Sticks

Source
*Circana, 52 w/e 27.12.25

“As pioneers of natural wet dog food for over 50 years, making nutritious recipes with high quality ingredients is at the heart of Forthglade,” says David Cox, CEO at Forthglade. “In 2026 we’re launching two innovative products we believe will land strongly with today’s dog owners. “The first is Bone Broth Toppers with added functional benefits,” he explains. Toppers represent a clear incremental white-space opportunity: they’re a great ‘meal upgrade’ that encourages shoppers to add one more item to their basket. By pairing bone broth with functional benefits, we’re giving dog owners a credible reason to trade up, adding value at shelf while offering retailers a straightforward way to drive incremental basket spend,” he notes. “The second is our small portion wet range, designed for dogs of all sizes. It fits modern feeding habits with many owners wanting to feed wet alongside dry, mixing textures and benefits. That



“For retailers the fastest-growing opportunity remains premium natural wet”

makes small portions an accessible step-up into premium wet, and a powerful premiumisation lever for the category.”

For retailers, the fastest-growing revenue opportunity remains premium natural wet, adds Cox. “As the growth engine of the category it is still under-represented in fixture space versus dry food.”

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* Circana Total Grocery RSV 52we 27/12/2025. Voted by readers of Your Dog magazine.

Celebrating dog nutrition

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KEY BRANDS

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PURINA EDWARD BAKER

“At UK Purina our dog portfolio is valued at £166.7m RSV¹ and caters for all consumer need states and budget,” reveals Ben Duncan, head of marketing, Purina northern region. “Our portfolio plays in two different areas of the category, delivering a trade-up model to drive category growth. These are categorised by Winalot – as our everyday feeding and caring brand, and Bakers, which falls within exciting mealtimes, serving up tasty visible goodness in every bowl.”

Winalot will soon be celebrating its centenary, marking 100 years as one of the most recognisable dog food brands in the UK, says Duncan. “Its wholesome, hearty dog food range has been much-loved by shoppers since 1927,” he notes. “It focuses on simple pleasures, and dependable nutrition celebrating ‘everyday heroes’, with heritage storytelling deeply woven into the brand world.”

Winning with Winalot

Building on the success of its No.1 wet dog pouch offering², Winalot has recently expanded into wet cans, which has taken it to No.2 branded position in the total wet dog market³. Winalot Friday Fish Suppers range was also recognised by shoppers as Product of the Year in the ‘Dog Food’ category for 2025⁴. “We are continuing with this popular trend for mirroring human traditions, launching a Monday Meaty Casserole offering, available in all major retailers from July 2026,” notes Duncan.

Combining wet food and dry kibble



“Combining wet food and dry kibble in the same routine is one of the most influential everyday patterns”

in the same feeding routine has become increasingly common and is now one of the most influential everyday feeding patterns. “With this in mind, we have leveraged the power of the Winalot Masterbrand and launched a Winalot Dry dog offering to drive trade-up and category value from own label,” explains Duncan. “We know treats are often used as a way for owners to show affection and appreciation toward their dogs,” he says.

“Winalot Shapes are positioned as a wholesome, healthy crunchy treat that supports everyday health. They are also a great way of expanding shopper basket spend as an affordable healthy treat.

“Last but not least, we recently introduced a new sub-brand under Bakers, named Edward Baker, reconnecting the Bakers brand to its deep historical roots,” adds Duncan. “This launch is significant because Edward Baker is not a fictional name, it’s the name of the founder of the original Bakers flour and feed business, dating back to 1851.”



Source

¹ Nestlé Purina internal sales figures
² Purina Master Scorecard to Jan 2026
³ www.productoftheyear.co.uk/2025/04/16/paws-actively-award-winning/



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KEY BRANDS

YuMOVE Joint Care
YuMOVE Digestive Care
YuMOVE Skin & Coat Care
YuMOVE Dental Care
YuMOVE Calming Care

Supporting pets' gut health is a major priority for Yumove and one of the brand's key innovations for 2026 builds on a significant launch from 2025: Yumove Digestive Care Rapid for All Dogs and Cats (30ml).

"The product was introduced to give dog and cat owners an accessible, convenient solution available through grocery retail, a crucial channel for those moments when pets experience sudden loose stools and owners need fast, reliable support," explains Adam Stephenson, director of eComm & UK retail at Vetnique.

Digestive Care Rapid for All Dogs and Cats is an easy-to-feed paste that helps firm up poos and support gut recovery after an upset tummy. "It contains pre and probiotics to help feed and stimulate the growth of good bacteria, helping pets get back on track and feeling great," he adds. Designed with practicality in mind, the one-size format, exclusive to the grocery channel, makes it a simple "grab-and-go" option.

As demand for proactive and reactive digestive care continues to rise, this innovation positions Yumove strongly for 2026, supporting the brand's commitment to improving pets' wellbeing through accessible, science-led solutions. "One of the most dynamic revenue opportunities in petcare right now lives within the supplements and calming sector," explains Emma Beynon, shopper marketing lead at Vetnique. "Worth £57.8m in the last year¹, this fast-growing sector has grown by £9.5m RSV year-on-year², making it the second-largest area within petcare³." Its momentum



“One of the most important trends retailers should focus on is the ageing of the UK pet population”

continues to outpace the wider pet and petcare markets with double-digit growth⁴, supported by a strong average unit price of £17.02. This surge reflects pet owner behaviour, with owners becoming increasingly proactive with their pet's health, making the sector one of the most valuable, incremental drivers of spend across the aisle.

Retailers who have and continue to prioritise this thriving sector through strong space, availability, education in aisle and standout visibility – will be well positioned to unlock meaningful growth, explains Becky Best, head of category at Vetnique. "One of the most important trends retailers should focus on is the ageing of the UK pet population," she says. "The surge in pet ownership during the pandemic means many dogs are now entering mature or senior life stages. As pets age, pet parents typically become more engaged in supporting their changing needs and look to support mobility, comfort and long-term wellbeing, as well as visiting their vet for science-led solutions."

This shift creates a growing demand for senior-specific products across categories, from joint, digestive and dental support to functional foods, she adds, noting: "Pet parents of older pets are increasingly proactive, seeking multi-modal routines to help maintain pets' quality of life for as long as possible."



Source
¹⁻⁴ Nielsen 52 w/e 24.01.26

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