The New Era of Private Label Pet Products

Value Meets Premium In Trends Shaping The Private Label Market

Today's consumer is balancing more considerations than ever when they shop for their pets. They want the very best pet products, but they are also navigating tighter household budgets and broader economic uncertainty. As a result, quality and affordability are no longer opposing forces. They are expectations that must coexist.

Products once considered indulgent are now evaluated through a more practical lens: Does this product deliver value without compromising care?

Important factors when shopping for pet food according to global dog and cat owners:[1]

67% "Good nutrition with nothing bad for my pets."

62% "Pet food that is well made with high-quality ingredients."

49% "I want good value for my money and prefer a low price."

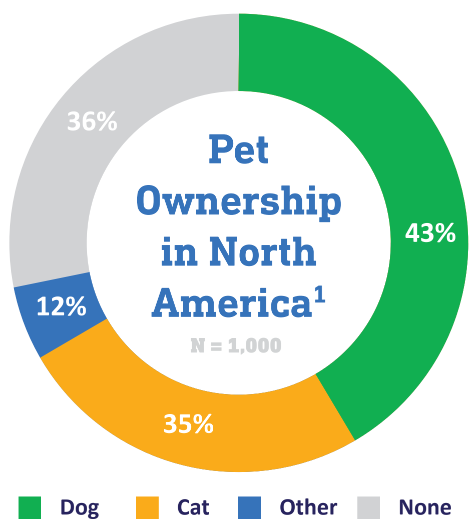
62% of Amazon shoppers state that price is the most important factor when choosing a retailer for pet products.[2]

Growing Trend:

Value-Forward Premiumization

One of the clearest manifestations of the shifting consumer mindset is the rise of value-forward premiumization. Consumers increasingly expect elevated nutrition, thoughtfully selected ingredients, and confidence-building packaging without an outlandish price tag. The definition of "premium" is evolving, shifting away from exclusivity and toward accessibility. Pet parents are no longer willing to sacrifice perceived quality to save money, nor are they willing to overpay for branding alone.

Economic pressure has only accelerated this recalibration. Rather than defaulting to traditional luxury brands, pet parents are scrutinizing labels, formulations, and price per ounce to determine which offerings deliver the most value and quality for their dollar. This environment has created powerful momentum for private label, positioning it as a credible, compelling alternative that meets consumers where they are: quality focused, value driven, and unwilling to compromise on care.



Market Growth:
Private Label & National Brands

In US retail, private label continues to gain momentum, with store brands outpacing national brands on both dollar and unit growth in 2025. Store brand dollar sales increased 3.3% across all categories, nearly triple the 1.2% growth posted by national brands.[3] This divergence highlights a structural shift in consumer behavior, as shoppers increasingly prioritize value, transparency, and performance over brand legacy.

Pet care, specifically, is emerging as a meaningful contributor within this broader private label expansion. In 2025, private label pet care unit sales grew 5.4%,[3] signaling sustained repeat purchasing. Pet care now represents 18.1% of total private label unit sales,[3] underscoring this category's growing importance within store brand portfolios. As retailers invest in formulation upgrades, packaging improvements, and clearer benefit communication, private label pet care is moving from a supplementary offering to a core growth driver.

Within pet care, growth is being propelled by high engagement subcategories, particularly treats and supplements. Year over year, pet treat unit sales surged 67% versus 2024,[3] reflecting strong consumer interest in fun and indulgent products at accessible price points. Pet supplements also showed robust gains, with unit sales up 39% compared to the prior year.[2] This performance reflects rising pet parent focus on proactive health, wellness, and longevity while also substantiating increased consumer trust in private label health and wellness solutions.

Taken together, these trends point to a clear opportunity for continued private label expansion. With national brands growing more slowly as consumers actively reassess value, pet care stands out as a category where retailers can capture incremental share and reinforce premium quality perceptions without premium pricing.

67% increase in private label pet treat unit sales from 2024 to 2025.[3]

77% of global pet owners agree that it's worth paying more for pet products featuring functional benefits.[1]

Premiumization:

Consumer Expectations for Private Label Pet Products

Private label premiumization has emerged as a powerful force reshaping the competitive landscape in pet care. No longer confined to entry-level price tiers or basic formulations, store brands are rapidly expanding their portfolios to include premium and even super premium offerings. These products increasingly rival national brands in formulation quality, functional benefits, and visual design while maintaining a meaningful price advantage. As retailers invest more deeply in R&D partnerships, ingredient sourcing, and packaging innovation, private label is evolving from a value substitute into a true brand building asset.

This shift is being reinforced by strong performance across multiple retail channels. Major retailers such as Walmart and Dollar General are seeing notable

Primary Health Concerns for Global Pet Owners:[1]

- 40% Digestive Health
- 38% Longevity
- 34% Immune Health
- 31% Joint/Bone Health
- 31% Dental Health

growth in private label pet sales[2] as they broaden their portfolios and elevate quality perceptions. At the same time, Amazon purchases of pet products continue to rise,[2] reflecting consumers' willingness to shop across channels in search of the best combination of quality, convenience, and price. Together, these dynamics illustrate how premium private label delivers a consistent value proposition that resonates. The growth across both value retailers and e-commerce platforms highlights an important dynamic: private label success is no longer channel-specific. Instead, it is driven by consistent value delivery across price tiers and shopping environments.

To fully capitalize on this momentum, store brands should focus on the elements that most clearly signal "premium" to today's pet owners. High quality nutrition, branded ingredients, and modern, elevated packaging are no longer optional, they are table stakes. The most successful private label strategies blend upgraded formulations and aesthetics with accessible price points, reinforcing the idea that better quality does not have to mean higher cost.

As cost-conscious yet quality-driven pet parents continue to reassess what premium means, private label is uniquely positioned to win. Retail brands that can authentically combine trust, performance, and affordability will stand out in an increasingly crowded marketplace, solidifying private label's role not just as a challenger to national brands, but as a category leader in its own right.

Four opportunities to reinforce consumer perception of quality in private label pet products:

1. Higher protein inclusion or named protein sources
2. Functional claims (gut health, calming, mobility)
3. Clean label positioning (no artificial additives)
4. Packaging that mirrors national brand design standards

62% of global pet owners cite ingredient lists as the primary reason for switching pet food brands.[4]

Activating In The Market:

Establishing Trust & Encouraging Trial

As private label expands into more premium territory, trust has become the central determinant of trial and ultimately, loyalty. Consumers are emotionally invested in the health and well being of their pets, with 56% of US owners considering their pets as family,[1] which raises the stakes for any purchase decision. Unlike many other consumer categories, pet care choices are deeply personal, and shoppers approach new products with a degree of caution. For private label brands to convert interest into trial, they must clearly demonstrate credibility, safety, and care at every touchpoint.

Ingredient transparency is one of the most powerful trust builders in this equation. Shoppers increasingly read labels, comparing protein sources, functional ingredients, and the absence of unwanted additives such as artificial colors or preservatives. In fact, 62% of global pet owners cite ingredient lists as the primary reason for switching pet food brands,[4] which further emphasizes the importance of transparent and health-focused ingredients in all pet products.

Functional and branded ingredients are another key driver of trial, particularly in high engagement segments like supplements. Pet parents are drawn to products that address specific health needs and contain recognizable functional ingredients. When surveyed, 67% of US pet owners state that they trust products with branded ingredients more than generic alternatives.[5] Private label brands can jumpstart trust by linking functional benefits to recognizable ingredients, making the value proposition easy to understand at a glance.

Ultimately, trust and trial are earned through consistent quality. Shoppers inherently associate store brands with the reputation of the retailer itself, so when private label brands deliver reliably across nutrition, transparency, and presentation, trial becomes less of a leap and more of a logical next step. As premiumization continues, the private label brands that succeed will be those that reduce uncertainty, speak with confidence and clarity, and reinforce the message that quality care and smart value are not mutually exclusive.

Closing Thoughts

Looking ahead, private label is poised to play an increasingly central role in pet care. Store brands are outpacing national brands, and pet care is emerging as a significant contributor to private label expansion. Retail brands that combine value-forward premiumization with trust-building execution will be best positioned to capture consumer loyalty and meet the evolving needs of cost-conscious yet quality-driven pet parents.

Private label brands that consistently deliver quality and affordability can reframe the purchase decision: choosing store brand becomes a smart, confident choice rather than a trade off. In a dynamic economic environment where pet owner expectations are rising and budgets remain under scrutiny, private label is no longer just keeping pace. It is setting the standard.

About The Author

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Interested in learning more? Visit ADM.com or contact our experts at petnutrition@adm.com

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SOURCES:

[1]ADM Outside Voice℠ Global Lifestyle Survey, 2025
[2]Numerator Pet Trends Report, 2025
[3]PLMA's 2026 Private Label Report
[4]Innova Pet Owners Survey, 2025
[5]ADM Outside Voice℠ (proprietary research conducted via Morning Consult), 2025

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