

Pet Anxiety & Wellness Products Market Forecasts to 2032 – Global Analysis By Product Type (Supplements, Pressure Wraps, Aromatherapy, Noise-Canceling Devices, Pheromone Collars, and Sensory Toys), Ingredient, Pet Type, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Pet Anxiety & Wellness Products Market is accounted for \$1.3 billion in 2025 and is expected to reach \$2.1 billion by 2032 growing at a CAGR of 6.3% during the forecast period. This market encompasses products designed to alleviate stress and improve the emotional well-being of pets. It includes items like anxiety-relief vests (e.g., ThunderShirt), calming pheromone diffusers (e.g., Adaptil, Feliway), CBD treats, calming supplements, and interactive smart toys that provide mental stimulation. Driven by the humanization of pets, these products help manage behaviors triggered by separation, thunderstorms, or travel, offering non-pharmaceutical solutions for pet owners seeking to improve their companion's quality of life.

According to the American Pet Products Association, rising awareness of pet mental health is fueling innovation in calming treats, wearables, and sensory enrichment tools for stress reduction.

Market Dynamics:

Driver:

Rising awareness of pet mental health

The increasing humanization of pets has led to heightened awareness regarding animal mental well-being. Pet owners are now more conscious of stress, anxiety, and behavioral issues among companion animals. This trend has spurred demand for wellness products such as calming supplements, anxiety wraps, and pheromone diffusers. Additionally, social media and veterinary endorsements have played a key role in normalizing mental health discussions for pets. Consequently, the growing understanding of emotional care for animals continues to drive steady market expansion globally.

Restraint:

Regulatory restrictions on ingredients

Stringent regulations governing the use of herbal extracts, CBD, and synthetic compounds in pet wellness formulations pose challenges for manufacturers. Regional variations in approval standards across countries further complicate product commercialization. Brands must invest heavily in compliance testing and documentation, raising overall production costs. Moreover, delays in certification or changing ingredient regulations can hinder market entry. These compliance hurdles restrict innovation and slow the launch of new formulations, limiting market scalability and global reach in the pet anxiety and wellness segment.

Opportunity:

Growth of online pet stores

The rapid expansion of online pet care platforms presents a major opportunity for market growth. E-commerce channels provide enhanced visibility and direct consumer access for niche wellness products. Subscription-based models and targeted digital advertising enable recurring sales and brand loyalty. Additionally, global marketplaces allow smaller brands to reach international pet owners efficiently. The convenience of doorstep delivery, coupled with personalized product recommendations powered by AI, is reshaping the retail landscape for pet anxiety and wellness products worldwide.

Threat:

Counterfeit or low-quality products

The proliferation of counterfeit and unregulated wellness products online poses a significant threat to brand credibility and consumer trust. Poor-quality supplements or mislabeled calming aids can cause adverse effects in pets, leading to stricter oversight. Additionally, unauthorized sellers on e-commerce platforms undermine legitimate pricing and distribution channels. This not only damages brand reputation but also erodes market share for trusted manufacturers. Ensuring authenticity through QR-based traceability and certification marks becomes crucial for maintaining consumer confidence and regulatory compliance.

Covid-19 Impact:

The pandemic accelerated pet adoption globally, with rising emotional dependence on animals during lockdowns. However, post-pandemic transitions such as owners returning to workplaces triggered increased anxiety among pets. This led to heightened demand for calming products and behavior management supplements. Supply chain disruptions initially constrained product availability, but digital retail compensated for sales gaps. Consequently, the pandemic reshaped consumer preferences toward holistic wellness and stress-relief solutions, reinforcing the long-term growth trajectory of the pet anxiety and wellness products market.

The supplements segment is expected to be the largest during the forecast period

The supplements segment is expected to account for the largest market share during the forecast period, resulting from widespread adoption of chewable tablets, oils, and powders addressing anxiety and behavioral issues. Pet owners prefer these formulations for their convenience, dosage accuracy, and fast efficacy. Additionally, expanding veterinary recommendations and growing interest in nutraceutical ingredients further bolster supplement demand. As functional wellness becomes integral to preventive pet care, this segment continues to dominate the overall pet anxiety and wellness landscape.

The natural ingredients segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the natural ingredients segment is predicted to witness the highest growth rate, propelled by consumer preference for herbal, plant-based, and organic formulations. Increasing skepticism toward synthetic additives has encouraged brands to develop clean-label products with chamomile, valerian root, and hemp extracts. These ingredients are associated with safer long-term use and fewer side

effects. The growing trend of holistic pet health, coupled with sustainability-focused branding, is driving rapid adoption of natural alternatives across global wellness portfolios.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, attributed to a surge in pet ownership and growing disposable incomes across China, India, and Japan. Regional manufacturers are increasingly introducing culturally adapted wellness products to cater to local preferences. Urbanization and social media awareness have enhanced acceptance of pet health supplements. Furthermore, the proliferation of e-commerce platforms and regional distribution networks has improved product accessibility, solidifying Asia Pacific's leadership in the global market.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR associated with rising consumer spending on premium pet wellness solutions and behavioral health products. Strong veterinary infrastructure and high awareness of anxiety-related disorders in pets are key growth enablers. Moreover, the presence of established brands and continuous innovation in CBD-infused calming products strengthen market traction. Increasing adoption of tele-veterinary consultations and direct-to-consumer models further accelerates product adoption across the U.S. and Canada.

Key players in the market

Some of the key players in Pet Anxiety & Wellness Products Market include ThunderShirt, Adaptil, Feliway, PetMD, Zesty Paws, VetriScience, Bach Rescue Remedy, Calming Collar, Furbo, Petcube, Anxitane, Solliquin, Nature's Miracle, Serenium, Happy Hoodie, and Earth Rated.

Key Developments:

In September 2025, ThunderShirt launched the new 'ThunderShirt Pro,' a smart calming wrap integrated with a patented, micro-vibration technology. The device uses gentle, rhythmic pulses that can be controlled via a smartphone app to mimic a calming heartbeat, providing a high-tech solution for noise phobias and separation anxiety.

In August 2025, Adaptil (Ceva Santé Animale) introduced the 'Adaptil Smart Diffuser with Home Monitoring.' The plug-in diffuser not only releases a dog-appeasing pheromone but also includes a built-in camera and microphone, allowing owners to check on their pets and dispense calming pheromone on-demand through an app.

In July 2025, Furbo announced a partnership with Zesty Paws to launch the 'Furbo Wellness System.' The system combines the Furbo dog camera with a smart dispenser for Zesty Paws' Calming Bites, allowing owners to remotely toss treats that contain calming ingredients like melatonin and L-Theanine when they see their dog showing signs of anxiety.

Product Types Covered:

Supplements

Pressure Wraps

Aromatherapy

Noise-Canceling Devices

Pheromone Collars

Sensory Toys

Ingredients Covered:

Natural Ingredients

Synthetic Ingredients

CBD-infused

Probiotics

Pet Types Covered:

Dogs

Cats

Small Mammals

Horses

Birds

End Users Covered:

Veterinary Clinics

Hospitals

Pet Owners

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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