

# **Pet Calming Products Market Forecasts to 2032 – Global Analysis By Product (Calming Treats & Chews, Calming Sprays & Diffusers, Calming Oils & Supplements, Calming Apparel, Calming Toys and Other Products), Pet Type, Form, Ingredient Type, Distribution Channel and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Pet Calming Products Market is accounted for \$18.77 billion in 2025 and is expected to reach \$32.68 billion by 2032 growing at a CAGR of 8.24% during the forecast period. Pet calming products are specialized items designed to reduce stress, anxiety, and hyperactivity in animals, promoting relaxation and overall well-being. These products cater to pets such as dogs, cats, and small mammals, addressing issues caused by separation, travel, loud noises, or environmental changes. They include a variety of forms, such as calming treats, chews, supplements, pheromone diffusers, sprays, collars, and anxiety wraps. These products are made with either natural or synthetic chemicals like pheromones, valerian root, or chamomile, function by calming pets' nervous systems or fostering a calm environment. Their primary goal is to improve pets' comfort, behavior, and quality of life.

Market Dynamics:

Driver:

Growing awareness among pet owners about anxiety and stress in pets

Pet owners are increasingly recognizing behavioral signs of stress, such as restlessness, aggression, and excessive barking, and seeking effective solutions.

Educational campaigns by veterinarians, pet care brands, and animal welfare organizations are boosting knowledge about pet mental health. This awareness encourages the adoption of calming products like supplements, diffusers, treats, and anxiety wraps. Social media and online communities are also spreading information about stress management in pets. As a result, demand for innovative and natural pet calming solutions is steadily increasing.

#### Restraint:

Limited scientific validation of efficacy for some calming products

Pet owners are often hesitant to invest in products without credible research or clinical evidence supporting their claims. This uncertainty reduces repeat purchases and slows overall adoption rates. Retailers and distributors may also be reluctant to stock products lacking proven results. Inconsistent outcomes further damage brand reputation and create skepticism in the market. As a result, the lack of strong scientific backing limits market growth potential.

#### Opportunity:

Increasing influence of pet humanization trends, with owners seeking premium care

Pet owners increasingly view their pets as family members, prompting them to invest in high-quality, safe, and effective calming products. This shift in perception encourages the adoption of advanced formulations, natural ingredients, and specialized solutions to address pets' stress and anxiety. Premiumization also boosts innovation, with manufacturers introducing diverse formats like treats, sprays, supplements, and wearable devices. As disposable incomes rise, owners are more willing to spend on preventive and wellness-focused products. Overall, the humanization trend significantly fuels market growth by prioritizing pets' emotional well-being alongside their physical health.

#### Threat:

High product costs reducing affordability for some consumers

Premium pricing of natural, organic, or specialized formulations often discourages budget-conscious pet owners from making purchases. This restricts market penetration in developing economies where disposable incomes are lower. Even in developed

markets, high prices can shift consumer preference toward cheaper, alternative solutions. Limited affordability also hampers repeat purchases, reducing long-term customer retention. As a result, overall market growth potential is constrained despite rising awareness of pet wellness.

#### Covid-19 Impact:

The COVID-19 pandemic significantly influenced the Pet Calming Products Market, as extended lockdowns and remote work increased pet adoption and owners' time spent with animals. This heightened awareness of pets' emotional well-being, driving demand for calming solutions like treats, sprays, and supplements. Supply chain disruptions initially affected product availability, but e-commerce growth offset physical store limitations. Rising cases of pet anxiety due to changes in daily routines further boosted interest in these products. Manufacturers adapted with online promotions and home-delivery models to meet shifting consumer needs.

The calming treats & chews segment is expected to be the largest during the forecast period

The calming treats & chews segment is expected to account for the largest market share during the forecast period by offering an easy and enjoyable way for pets to consume stress-relief supplements. These products appeal to pet owners seeking a non-invasive, reward-based method to manage anxiety in pets. They often contain natural calming ingredients like chamomile, valerian root, or CBD, boosting consumer confidence. The convenience of treats and chews encourages repeat purchases and higher adoption rates. Their dual benefit of nutrition and anxiety reduction strengthens market growth.

The blended formulations segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the blended formulations segment is predicted to witness the highest growth rate by combining multiple active ingredients to enhance overall calming effectiveness. These formulations offer synergistic benefits, addressing various causes of pet anxiety such as travel stress, separation, and environmental changes. They cater to a broader range of pet species and preferences, increasing consumer adoption. The versatility of blended products also allows manufacturers to innovate with flavors, delivery formats, and health-boosting additives. As a result, they strengthen brand differentiation and drive consistent market growth.

### Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share benefits from a well-established pet care industry and high expenditure on companion animal wellness, especially in the United States and Canada. A strong culture of preventive healthcare for pets drives demand for calming chews, sprays, diffusers, and weighted vests. Growing concerns over separation anxiety and noise phobia in pets are influencing product innovation. The presence of major global brands, along with veterinary recommendations, enhances consumer trust. Additionally, specialized formulations with CBD and functional ingredients are trending, supported by robust retail and online distribution networks.

### Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR due to increasing pet ownership in countries like China, Japan, India, and Australia, coupled with rising awareness of pet wellness. Growing urbanization and smaller living spaces contribute to stress in pets, boosting demand for calming supplements, treats, and wearable anxiety aids. E-commerce platforms and premium pet care brands are driving availability. Innovations using natural herbal formulations and aromatherapy are gaining popularity. Rising disposable incomes and humanization of pets are fostering product adoption across both urban and semi-urban markets.

### Key players in the market

Some of the key players in Pet Calming Products Market include Zoetis Inc., Virbac S.A., Zesty Paws LLC, PetHonesty LLC, ThunderWorks Inc., PetIQ Inc., NOW Health Group Inc., Ceva Santé Animale, Garmon Corporation, Nestlé Purina PetCare Company, Pet Naturals of Vermont, VetriScience Laboratories, Comfort Zone, Bach Rescue Remedy, Calm Paws, Pet Remedy, Beaphar BV and Nutramax Laboratories.

### Key Developments:

In January 2025, Virbac unveiled ZENIFEL™, a cat-targeted calming range featuring an electric-free, portable gel diffuser and spray. Each diffuser lasts up to two months and blends synthetic feline facial pheromones with catnip extract, designed to soothe stress-induced behaviors and enrich Virbac's behavioral product line.

In April 2024, Virbac completed the acquisition of Sasaeah. Again, not a calming-product buy, but it increases Virbac's farm/companion footprint in a major market relevant because it improves distribution/market presence that can support launching companion products locally.

In June 2023, Zesty Paws expanded the distribution of its flagship calming bites into major retailers including Tractor Supply Company, CVS Pharmacy, Pets Plus Natural, and Walmart across the United States. The brand further extended its reach into Walmart Canada, significantly increasing mass-retail and pharmacy access for pet owners seeking calming solutions.

#### Product Types Covered:

Calming Treats & Chews

Calming Sprays & Diffusers

Calming Oils & supplements

Calming Apparel

Calming Toys

Other Products

#### Pet Types Covered:

Dogs

Cats

Small Mammals

Other Pet Types

#### Forms Covered:

Edible

Liquid

Spray

Capsule

Powder

Other Forms

#### Ingredient Types Covered:

Herbal & Natural Extracts

Synthetic Ingredients

Blended Formulations

#### Distribution Channels Covered:

Online Retail

Offline Retail

#### 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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