

# **Pet Mental Health & Wellbeing Market Forecasts to 2032 – Global Analysis By Product (Supplements & Nutraceuticals, Medications & Pharmaceuticals, Behavioral Therapy Tools, Wearables & Monitoring Devices), Pet Type, Application, Distribution Channel and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Pet Mental Health & Wellbeing Market is accounted for \$2.6 billion in 2025 and is expected to reach \$4.3 billion by 2032 growing at a CAGR of 7.3% during the forecast period. Pet mental health and wellbeing refers to the emotional, psychological, and social state of animals, influencing how they feel, behave, and interact with their environment. It encompasses factors like stress levels, stimulation, companionship, and overall happiness. Just like humans, pets thrive in environments that offer safety, affection, routine, and enrichment. Good mental health in pets promotes positive behaviors, reduces anxiety or aggression, and enhances their quality of life. Owners play a vital role by providing proper care, attention, and understanding of their pet's needs. Supporting pet wellbeing ensures a harmonious bond and contributes to their long-term physical and emotional health.

Market Dynamics:

Driver:

Rising Pet Ownership

The increasing global trend of pet ownership is a major driver of the pet mental health and wellbeing market. As more individuals and families adopt pets, the demand for

emotional and behavioral support products rises. Owners are becoming more aware of their pets' psychological needs, seeking solutions that promote happiness, reduce stress, and improve behavior. This growing awareness fuels innovation in therapeutic tools, supplements, and interactive products, significantly contributing to market expansion and enhancing the overall quality of pet care.

Restraint:

#### Limited Clinical Validation

A key restraint in the pet mental health market is the limited clinical validation of available products and therapies. Many offerings lack rigorous scientific research or standardized testing, leading to skepticism among veterinarians and pet owners. Without proven efficacy, adoption rates may be hindered, and regulatory approvals become challenging. This gap in validation affects consumer trust and slows market growth, especially in regions where evidence-based care is prioritized. Addressing this issue is crucial for long-term credibility and expansion.

Opportunity:

#### Urbanization & Lifestyle Changes

Urbanization and changing lifestyles present a significant opportunity for the pet mental health market. As more people live in cities and adopt pets for companionship, the need for mental stimulation and behavioral support increases. Smaller living spaces, limited outdoor access, and busy routines can lead to anxiety and boredom in pets. This drives demand for enrichment tools, calming aids, and digital wellness solutions tailored to urban environments. Companies can capitalize on this shift by offering innovative, accessible products for city-dwelling pet owners.

Threat:

#### High Cost of Premium Products

The high cost of premium pet mental health products poses a considerable threat to market accessibility. Advanced therapies, supplements, and tech-enabled solutions often come with steep price tags, limiting adoption among budget-conscious consumers. This cost barrier is especially pronounced in emerging markets, where affordability is a key concern. Without more economical alternatives, the benefits of pet

wellbeing may remain confined to affluent segments, potentially stalling inclusive growth and reducing overall market penetration.

#### Covid-19 Impact:

The COVID-19 pandemic had a complex impact on the pet mental health market. While pet adoption surged during lockdowns, disrupted routines and increased stress affected animal behavior. Owners sought solutions for anxiety, aggression, and boredom, boosting demand for mental health products. However, supply chain disruptions and economic uncertainty hindered product availability and spending. The pandemic underscored the importance of emotional wellbeing in pets, accelerating awareness and long-term investment in behavioral care. It also reshaped consumer priorities toward holistic pet wellness.

The pet specialty stores segment is expected to be the largest during the forecast period

The pet specialty stores segment is expected to account for the largest market share during the forecast period due to their focused offerings and expert guidance. These stores provide curated selections of mental health products, including calming treats, anxiety-reducing toys, and behavioral supplements. Their knowledgeable staff and personalized services enhance customer trust and satisfaction. As pet owners increasingly seek specialized care, these stores become central hubs for wellness solutions. Their ability to offer tailored recommendations and premium products drives consistent sales and loyalty.

The aggression control segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the aggression control segment is predicted to witness the highest growth rate due to rising behavioral issues among pets. Urban living, lack of socialization, and post-pandemic stress contribute to increased aggression in animals. Owners are turning to targeted therapies, training aids, and calming supplements to manage these behaviors. Innovations in pheromone-based products, behavioral conditioning tools, and natural remedies are gaining traction. This segment's rapid growth reflects a heightened focus on emotional regulation and safer interactions between pets and humans.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to rising pet ownership, increasing disposable incomes, and growing awareness of pet wellbeing. Countries like China, Japan, and India are witnessing a cultural shift toward treating pets as family members, spurring demand for emotional and behavioral care products. Expanding urban populations and proliferation of pet specialty stores further supports market growth. Regional manufacturers are also investing in localized solutions, enhancing accessibility and relevance across diverse markets.

#### Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR owing to advanced veterinary infrastructure, high pet spending, and strong consumer awareness. The region's emphasis on holistic pet care, including emotional wellbeing fuels innovation and adoption of premium products. Tech-savvy consumers embrace digital wellness tools, behavioral therapies, and subscription-based services. Regulatory support and a mature pet care ecosystem further encourage product development. With a focus on quality and innovation, North America leads in both market expansion and trendsetting.

#### Key players in the market

Some of the key players in Pet Mental Health & Wellbeing Market include Mars Petcare, Boehringer Ingelheim Animal Health, Zoetis, Bayer Animal Health, Merck Animal Health, Petlab Co., Nestlé Purina PetCare, PetIQ, Elanco Animal Health, Nutramax Laboratories, Hill's Pet Nutrition, Zesty Paws, Virbac, Honest Paws, and Vetoquinol.

#### Key Developments:

In June 2025, Nestlé Purina PetCare has partnered with Berry Global to introduce recyclable cat treat canisters made entirely from mechanically recycled polyethylene terephthalate (PET), excluding the lid and label. This initiative aims to eliminate over 500 metric tons of virgin plastic annually and reduce CO<sub>2</sub> emissions by approximately 694 metric tons per year.

In May 2025, AmacaThera and Merck Animal Health have initiated a strategic collaboration to advance veterinary medicine. Leveraging AmacaThera's proprietary AmacaGel™ hydrogel platform, the partnership aims to develop long-acting injectable

therapies that enhance drug delivery and improve animal welfare.

Products Covered:

Supplements & Nutraceuticals

Medications & Pharmaceuticals

Behavioral Therapy Tools

Wearables & Monitoring Devices

Pet Types Covered:

Dogs

Cats

Birds

Small Mammals

Exotic Pets

Applications Covered:

Anxiety & Stress Management

Sleep & Relaxation

Aggression Control

Cognitive Health & Stimulation

Behavioral Correction

**Distribution Channels Covered:**

- Online Retail
- Pet Specialty Stores
- Veterinary Clinics & Hospitals
- Supermarkets & Hypermarkets
- Direct-to-Consumer (D2C)

**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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