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Pet Mental Wellness Market Forecasts to 2034 – Global Analysis By Product Type (Nutraceuticals & Supplements, Therapeutic Products, Wearables & Monitoring Devices, Pharmaceuticals), Indication (Anxiety & Stress, Behavioral Disorders, Cognitive Dysfunction & Aging, Emotional Well-being & Mood Support), Animal Type, Distribution Channel, and By Geography

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Abstracts

According to Stratistics MRC, the Global Pet Mental Wellness Market is accounted for $3.5 billion in 2026 and is expected to reach $7.2 billion by 2034 growing at a CAGR of 9.2% during the forecast period. Pet mental wellness encompasses products, supplements, therapies, and services designed to address psychological well-being in companion animals, including anxiety relief, stress management, cognitive support, and behavioral enrichment. Growing recognition that pets experience complex emotions similar to humans has transformed pet care from a focus on physical health alone to a holistic approach encompassing mental and emotional wellness. This market includes calming supplements, pheromone diffusers, interactive toys, anxiety wraps, and professional behavioral consultation services.

Market Dynamics:

Driver:

Rising humanization of pets and awareness of animal emotions

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Pet owners increasingly view their companion animals as family members deserving comprehensive emotional care comparable to human standards. This cultural shift has dramatically expanded willingness to invest in products addressing pet anxiety, separation stress, and age-related cognitive decline. Veterinary professionals and animal behaviorists have contributed to this awareness by publishing research demonstrating that pets suffer from recognizable mental health conditions requiring intervention. Social media communities dedicated to pet wellness share success stories and product recommendations, creating powerful word-of-mouth marketing. As humanization trends intensify across developed economies, spending on pet mental wellness continues its upward trajectory.

Restraint:

Limited scientific validation and regulatory oversight

Many pet mental wellness products lack robust clinical evidence supporting their efficacy claims, creating skepticism among veterinarians and informed consumers. The supplement and therapeutic product categories operate under less stringent regulatory frameworks than pharmaceuticals, allowing products with minimal research to reach the market. This absence of standardization makes it difficult for pet owners to distinguish genuinely effective solutions from marketing-driven offerings. Veterinary professionals may hesitate to recommend products without peer-reviewed studies, limiting clinical integration. Regulatory bodies in several regions are beginning to examine this category more closely, but current gaps in oversight continue to restrain market confidence.

Opportunity:

Integration of technology and smart wellness devices

Technological innovations are creating unprecedented opportunities for monitoring and improving pet mental wellness in real time. Smart collars equipped with biometric sensors can detect stress indicators including elevated heart rate and increased cortisol levels, alerting owners to anxiety episodes before behavioral manifestations occur. Interactive camera systems allow remote treat dispensing and two-way communication, reducing separation anxiety for pets left alone during work hours. App-connected puzzle toys adjust difficulty based on pet performance, maintaining optimal cognitive engagement. These technology-enabled solutions appeal to tech-savvy pet owners and generate valuable usage data that can inform continuous product improvement.

Threat:

Economic sensitivity and discretionary spending patterns

Pet mental wellness products remain largely discretionary purchases, making the market vulnerable to economic downturns and inflationary pressures. When household budgets tighten, owners may prioritize essential veterinary care and food over calming supplements or interactive enrichment toys. The premium pricing of many specialized products exacerbates this vulnerability, as consumers may seek lower-cost alternatives or reduce purchase frequency during financial stress. This economic sensitivity creates forecasting challenges for manufacturers and retailers, requiring flexible inventory and pricing strategies. Long-term market growth depends partly on demonstrating clear therapeutic value that consumers recognize as non-discretionary for pets with diagnosed conditions.

Covid-19 Impact:

The COVID-19 pandemic created complex effects on pet mental wellness, with both positive and negative consequences for market development. Widespread lockdowns increased pet adoptions and human-animal bonding time, raising awareness of pet behavioral needs as owners observed their animals more closely. However, the subsequent return to workplaces triggered a surge in separation anxiety cases among pets accustomed to constant human presence, driving immediate demand for anxiety relief products. Remote work arrangements allowed owners more time for behavioral training and enrichment activities, potentially improving long-term mental wellness outcomes. The pandemic fundamentally elevated attention to pet psychological health as owners recognized the emotional toll of disrupted routines.

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

The Dogs segment is expected to account for the largest market share during the forecast period, reflecting both the global popularity of canine companions and their particular susceptibility to mental wellness challenges. Dogs experience higher rates of separation anxiety, noise phobias, and social stressors than many other companion animals, driven by their strong pack bonding instincts and sensitivity to human emotional states. The extensive range of dog-specific products, including anxiety wraps, calming beds, puzzle toys, and behavior modification supplements, far exceeds offerings for other animal types. Dog owners also demonstrate greater willingness to invest in specialized wellness products, supported by robust communities of canine enthusiasts sharing behavioral management strategies.

The Online & E-commerce segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Online & E-commerce segment is predicted to witness the highest growth rate, driven by consumer preferences for convenient home delivery and access to broader product selections. Pet owners researching mental wellness solutions increasingly turn to digital channels for product reviews, ingredient comparisons, and educational content before making purchasing decisions. Subscription-based models delivering calming supplements or interactive toys on regular schedules have gained significant traction among owners managing chronic anxiety conditions. The pandemic accelerated this shift, with many first-time online pet shoppers continuing digital purchasing habits. E-commerce platforms also enable smaller specialty brands to reach niche audiences without physical retail distribution, expanding market diversity.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by high pet ownership rates, advanced veterinary infrastructure, and strong humanization trends. The region's pet owners spend significantly more per animal on wellness products than counterparts in other regions, with mental wellness recognized as a standard component of comprehensive pet care. Major manufacturers of calming supplements, pheromone diffusers, and interactive toys are headquartered in North America, driving product innovation and marketing investment. Veterinary professional organizations have published clinical guidelines for managing pet anxiety and cognitive dysfunction, legitimizing the category. This combination of consumer willingness and professional endorsement ensures North America's continued market leadership.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rising pet ownership among urban professionals and increasing disposable incomes across emerging economies. Rapid urbanization has created unique pet stressors, including confined living spaces and extended owner absences, driving demand for mental wellness solutions. Younger pet owners in countries including China, Japan, and South Korea have embraced Western-style humanization trends, viewing pets as family members deserving emotional care. E-commerce penetration in the region facilitates access to specialized products previously unavailable through traditional retail channels. As veterinary professionals receive expanded training in behavioral medicine, clinical recommendation of mental wellness products is accelerating adoption across this dynamic region.

Key players in the market

Some of the key players in Pet Mental Wellness Market include Mars Incorporated, Nestl? Purina PetCare, Elanco Animal Health Incorporated, Zoetis Inc., Virbac SA, Vetoquinol SA, Ceva Sant? Animale, ThunderWorks Inc., PetHonesty LLC, Zesty Paws, NaturVet, VetriScience Laboratories, Only Natural Pet, PetIQ Inc., Adaptil and Boehringer Ingelheim Animal Health.

Key Developments:

In September 2025, Ceva launched a revamped 'Happy Together' global campaign for Adaptil, introducing a new pheromone formulation designed for high-stress travel and environmental changes, strengthening its position in the feline and canine pheromone market.

In August 2025, Elanco successfully integrated the Reconcile (fluoxetine hydrochloride) awareness program into its digital 'Pet Health' portal, aimed at treating separation anxiety in dogs through a combination of medication and behavior modification.

Product Types Covered:

- Nutraceuticals & Supplements
- Therapeutic Products
- Wearables & Monitoring Devices
- Pharmaceuticals

Indications Covered:

- Anxiety & Stress

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Behavioral Disorders

Cognitive Dysfunction & Aging

Emotional Well-being & Mood Support

Animal Types Covered:

Dogs

Cats

Equine

Small Mammals

Other Animal Types

Distribution Channels Covered:

Veterinary Clinics & Hospitals

Pet Specialty Stores

Online & E-commerce

Other Distribution Channels

Regions Covered:

North America

United States

Canada

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Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

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- Thailand
- Malaysia
- Singapore
- Vietnam
- Rest of Asia Pacific

South America

- Brazil
- Argentina
- Colombia
- Chile
- Peru
- Rest of South America

Rest of the World (RoW)

- Middle East
  - Saudi Arabia
  - United Arab Emirates
  - Qatar
  - Israel
  - Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of 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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- 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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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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