

Global Cat Treats Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 3.6 bn
Forecast (2031)	USD 5.5 bn
CAGR (2021-2031)	7.4%
Study period	2021-2031
Largest region	North America · 38.6%
Fastest-growing region	Asia-Pacific · 8.9%
Market concentration	Moderate
Licence	Individual / Company

The global cat treats market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Category growth is shifting from conventional crunchy snacks toward lickable purées, functional formulations, dental products and minimally processed protein treats. North America remains the largest regional market with XX% of 2025 revenue, while Asia-Pacific delivers the fastest growth at an XX% CAGR. Mars, Nestlé Purina, INABA, General Mills and Hartz compete through format innovation, premium positioning, broad retail distribution and high-frequency product launches.

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Executive summary

The global cat treats market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Category growth is shifting from conventional crunchy snacks toward lickable purées, functional formulations, dental products and minimally processed protein treats. North America remains the largest regional market with XX% of 2025 revenue, while Asia-Pacific delivers the fastest growth at an XX% CAGR. Mars, Nestlé Purina, INABA, General Mills and Hartz compete through format innovation, premium positioning, broad retail distribution and high-frequency product launches.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global cat treat sales totaled USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- The market expands at a XX% CAGR between 2025 and 2031, adding USD XXX billion in annual revenue.
- North America generated XX% of global market value in 2025.
- Asia-Pacific represents XX% of 2025 revenue and records the fastest regional CAGR at XX%.
- Crunchy and dry treats retained XX% of 2025 value, supported by affordability, established brands and high household penetration.
- Lickable purées and sticks accounted for XX% of 2025 value and will grow at a XX% CAGR through 2031.
- Online retail generated XX% of global sales in 2025 and is the fastest-growing distribution channel at a XX% CAGR.
- APPA reported that XXX U.S. households owned a cat in 2025, equivalent to XX% of households.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Cat Treats Market Trends and Growth Drivers

Cat treats sit at the intersection of indulgence, enrichment and preventive care. The category is expanding beyond occasional crunchy rewards as owners use purées for bonding and hydration, dental products for daily routines and protein-forward treats as visible expressions of nutritional quality.

Value growth is increasingly determined by format and benefit mix rather than simple unit expansion. Single-serve purées, freeze-dried proteins and functional products lift average selling prices, while larger multipacks and private label preserve accessibility for budget-sensitive households.

Competitive advantage depends on repeat palatability, credible claims, secure protein sourcing and channel-specific pack architecture. Global groups possess scale and retailer access, but specialists continue to create high-growth subcategories that become acquisition targets or expansion platforms.

Growth drivers

Expanding Cat-Owning Household Base

Cat ownership is broadening across younger households, urban consumers and smaller homes where cats fit space and lifestyle constraints. Each newly formed cat household creates recurring demand for rewards, enrichment products and bonding-oriented snacks, while multi-cat ownership raises purchase frequency and pack-size requirements.

Premiumization of Feline Nutrition

Owners increasingly assess treats using the same ingredient, provenance and wellness criteria applied to complete pet food. Real-meat recipes, limited ingredients, freeze-dried proteins and grain-free claims raise average selling prices and expand the category's value faster than its physical volume.

Lickable Treat Format Expansion

Single-serve purées create a direct feeding ritual that strengthens owner-pet interaction and supports hydration, medication delivery and meal topping. Strong repeat purchase, wide flavor extensibility and compact shelf presentation are accelerating adoption across mass, specialty and online retail.

Functional Treats Move into Daily Routines

Dental, hairball, digestive, skin-and-coat and calming benefits convert occasional treats into scheduled care products. Products with clear dosage instructions and benefit substantiation support premium pricing and attract veterinary, pet-specialty and health-oriented online shoppers.

E-Commerce Assortment and Replenishment

Digital channels provide shelf space for specialized proteins, age-specific formulas and large variety packs that physical stores cannot stock economically. Reviews, subscriptions and recommendation engines improve discovery and reorder rates, particularly for purées and functional products.

Asia-Pacific Premium Pet-Care Adoption

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Rising disposable income, urban cat ownership and established fish-based snacking cultures support rapid category development in China, Japan, South Korea and Southeast Asia. Local manufacturers and Japanese format innovators are expanding purée, stick and seafood assortments across modern retail and marketplaces.

Restraints

Consumer Trade-Down and Price Sensitivity

Persistent food inflation encourages households to reduce purchase frequency, switch to larger value packs or choose private-label alternatives. Premium freeze-dried and functional lines face the greatest unit resistance when their benefits are not immediately visible.

Protein and Packaging Cost Volatility

Poultry, tuna, salmon and organ-meat costs directly affect treat formulations, while high-moisture purées require reliable barrier packaging and sterilization systems. Margin compression is strongest among smaller brands with limited procurement scale and dependence on contract manufacturing.

Claims and Ingredient Compliance Complexity

Health-positioned treats must remain within feed and animal-food rules governing ingredients, additives, labeling and disease-related claims. Multi-market launches require localized labels and claim review, increasing development cost and slowing the rollout of functional products.

Calorie and Overfeeding Concerns

Veterinary guidance commonly positions treats as a controlled share of daily calorie intake, limiting unconstrained consumption growth. Brands must deliver smaller portions, low-calorie recipes and explicit feeding guidance to prevent treats from displacing nutritionally complete meals.

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Cat Treats Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Expanding Cat-Owning Household Base	XXX	XXX	XXX
Premiumization of Feline Nutrition	XXX	XXX	XXX
Lickable Treat Format Expansion	XXX	XXX	XXX
Functional Treats Move into Daily Routines	XXX	XXX	XXX
E-Commerce Assortment and Replenishment	XXX	XXX	XXX
Asia-Pacific Premium Pet-Care Adoption	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Consumer Trade-Down and Price Sensitivity	XXX	XXX	XXX
Protein and Packaging Cost Volatility	XXX	XXX	XXX
Claims and Ingredient Compliance Complexity	XXX	XXX	XXX
Calorie and Overfeeding Concerns	XXX	XXX	XXX

Source: XXX

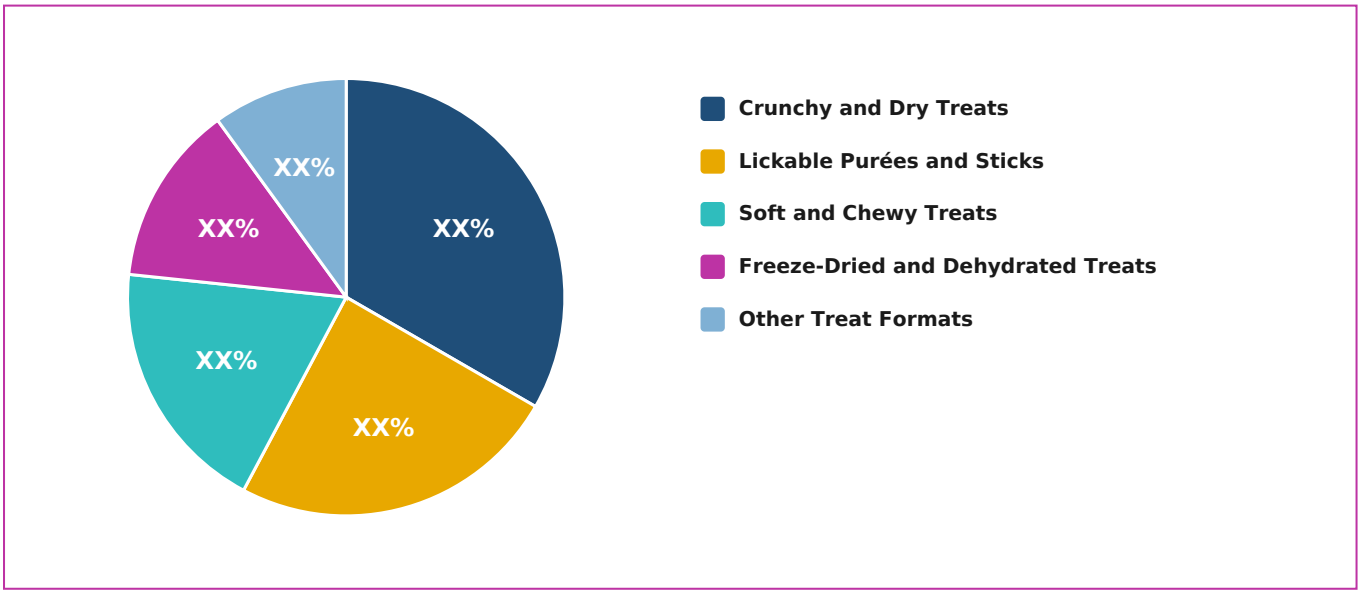
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Cat Treats Market Segmentation by Format, Benefit, Packaging and Channel

By Product Format

Crunchy treats retain the broadest household penetration because they offer low serving costs, shelf stability and familiar reward cues. Lickable purées are taking share through hand feeding, hydration support, medication administration and meal-topper use. Freeze-dried products remain smaller but command premium prices through recognizable protein ingredients and minimal processing.

Value share by product Format, 2025



Source: XXX

Value by product Format, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Crunchy and Dry Treats	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Lickable Purées and Sticks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Soft and Chewy Treats	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Freeze-Dried and Dehydrated Treats	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Treat Formats	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Benefit Positioning

Everyday rewards remain the category's volume foundation, led by taste, bonding and routine use. Functional wellness treats are gaining shelf space through digestive, hairball, calming, skin-and-coat and

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immune-support positioning. Dental products form a distinct recurring-use segment, while natural and single-ingredient lines attract premium buyers seeking short ingredient lists.

Value by benefit Positioning, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Everyday Indulgence and Reward	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Functional Wellness	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dental and Oral Care	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Natural and Single-Ingredient	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging Format

Pouches dominate crunchy, soft and freeze-dried products because they balance shelf visibility, barrier performance and resealability. Tubes and sticks are expanding with lickable purées and portion-controlled feeding, although material intensity creates a sustainability challenge. Tubs and jars remain important for high-frequency households and value packs.

Value by packaging Format, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Resealable Pouches and Bags	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Single-Serve Tubes and Sticks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tubs and Jars	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Boxes and Cartons	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Packaging	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

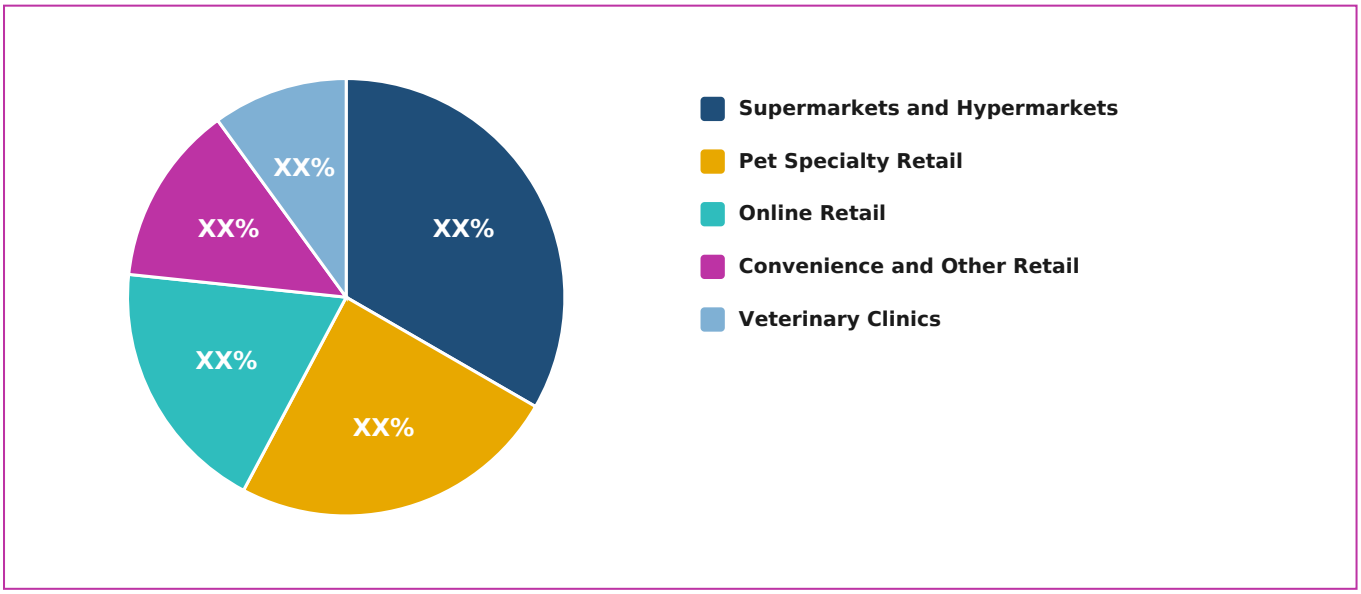
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By Distribution Channel

Grocery and mass retail remain essential for leading crunchy brands and impulse replenishment. Pet-specialty stores over-index in functional, freeze-dried and premium imported products because staff guidance and broader assortments support trade-up. Online retail is gaining share through subscriptions, reviews, multipacks and access to specialized flavors.

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Value share by distribution Channel, 2025



Source: XXX

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Supermarkets and Hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pet Specialty Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Convenience and Other Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Veterinary Clinics	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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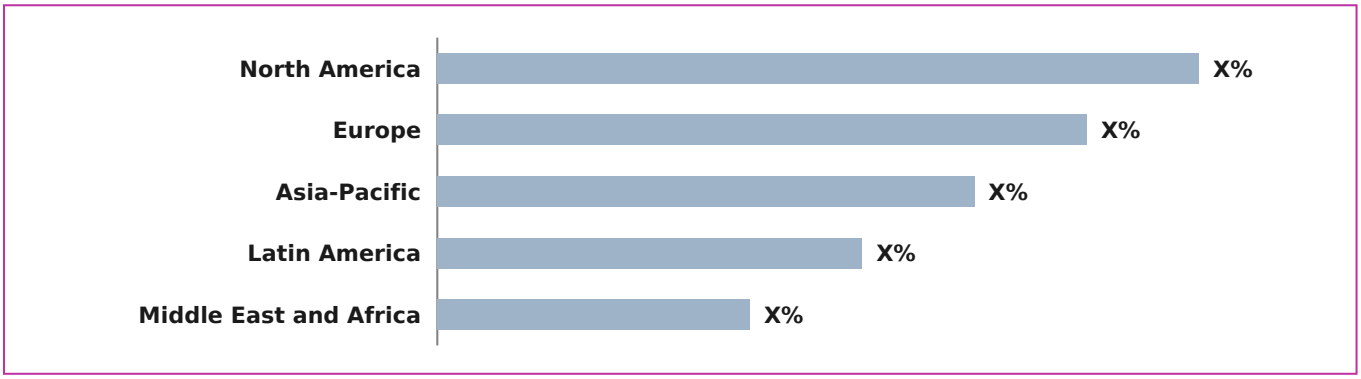
Cat Treats Market Regional Analysis and Country Outlook

North America led the global cat treats market with XX% of 2025 revenue, supported by high cat-care spending, deep penetration of mass and pet-specialty retail and strong household familiarity with daily treating. The United States anchors the region through Mars' TEMPTATIONS and GREENIES franchises, Nestlé Purina's Friskies and Fancy Feast ranges, Hartz Delectables, INABA Churu and expanding premium portfolios. Functional dental products, lickable purées, multipacks and e-commerce replenishment generate the region's strongest value growth.

Europe accounted for XX% of 2025 market value, with the United Kingdom, Germany and France forming the largest national opportunities. The regional market favors transparent ingredient declarations, recyclable packaging and premium products built around meat content, natural positioning and functional benefits. EU feed-marketing, additive and organic-labeling rules influence formulation and claims, while grocery private label remains a stronger competitive force than in North America.

Asia-Pacific held XX% of global value and will grow at an XX% CAGR through 2031, the fastest of any region. Japan remains the format-innovation center for purées, sticks and seafood-based products, while China delivers the largest incremental revenue opportunity through e-commerce, premium imported brands and domestic manufacturing. South Korea, Australia, Thailand and Southeast Asian urban markets add momentum through high engagement with cats, compact housing and rapid modern-retail development.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Cat Treats Market Competitive Landscape and Company Share

The global market is moderately concentrated: large pet-care groups control the leading crunchy, dental and mass-market franchises, while specialist companies retain strong positions in lickable and minimally processed formats. Mars competes through TEMPTATIONS, DREAMIES and GREENIES; Nestlé Purina spans Friskies, Fancy Feast and Purina ONE; INABA defines the lickable-purée segment through Churu; and General Mills has expanded its premium cat platform through Blue Buffalo and Tiki Cat.

Scale advantages center on palatability research, protein procurement, sterilization and drying capabilities, retailer category management and global advertising. Specialists compete through faster formulation cycles, single-protein products, freeze-drying, functional claims and social-media-led brand building. Private-label manufacturers are gaining relevance in natural treats and purées as retailers seek differentiated margins and exclusive formats.

Acquisition activity demonstrates the strategic value of premium cat nutrition and treating. General Mills completed the USD XXX billion purchase of Whitebridge Pet Brands' North American business in December 2024, adding Tiki Pets and two Missouri manufacturing facilities. Investment priorities through 2031 will focus on purée capacity, functional formulations, high-barrier packaging, Asia-Pacific distribution and direct-to-consumer data.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Mars Petcare	XXX	XXX	XXX	XXX
Nestlé Purina PetCare	XXX	XXX	XXX	XXX
INABA Foods	XXX	XXX	XXX	XXX
General Mills	XXX	XXX	XXX	XXX
The Hartz Mountain Corporation	XXX	XXX	XXX	XXX
Wellness Pet Company	XXX	XXX	XXX	XXX
Unicharm Corporation	XXX	XXX	XXX	XXX
Thai Union Group	XXX	XXX	XXX	XXX
i-Tail Corporation	XXX	XXX	XXX	XXX
VAFO Group	XXX	XXX	XXX	XXX

Source: XXX

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Cat Treats Market Forecast and Commercial Opportunities

The cat treats market will add USD XXX billion between 2025 and 2031 as treating becomes more frequent, more interactive and more closely connected to feline health routines. Lickable products will supply the largest incremental revenue by format, while functional treats will outperform general indulgence products on value growth. Crunchy treats will remain the largest format because of their price accessibility, long shelf life and extensive retail distribution.

The central forecast assumes continued household prioritization of pet spending, moderate ingredient inflation and steady expansion of modern retail and e-commerce in emerging markets. Upside will come from faster cat-ownership growth, broader clinical support for dental and digestive products and successful packaging-cost reduction. Downside pressure will center on consumer trade-down, tuna and poultry cost shocks and tighter interpretation of wellness claims.

Winning portfolios will combine an accessible everyday line with premium purées, functional products and recognizable-protein offerings. Manufacturers that can substantiate benefits, maintain feline palatability, localize flavors and reduce packaging intensity will secure superior shelf productivity. Asia-Pacific distribution and online repeat-purchase systems will be decisive sources of growth beyond mature North American retail.

Opportunities

- Hydration-support and senior-cat treats
- Clinically substantiated dental and digestive-health products
- Freeze-dried and air-dried single-ingredient proteins
- Locally adapted fish and poultry flavors in Asia-Pacific
- Recyclable mono-material pouches and reduced-plastic tube systems
- Veterinary-channel treats supporting medication administration
- Personalized multipacks and direct-to-consumer subscriptions

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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