SHAPING THE FUTURE OF PET CARE: MARKET TRENDS, REGULATORY LANDSCAPE, AND KEY CHALLENGES FOR MANUFACTURERS

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ABSTRACT

Driven by the growing population of companion animals and the ongoing humanisation of the human–animal relationship, the market for pet care and protection products continues to expand rapidly both in Poland and globally. At the same time, these products are subject to a complex regulatory framework, as there is no harmonised legal category of "animal cosmetics" under European Union legislation. This article reviews the key regulatory frameworks applicable to manufacturers, discusses classification challenges, and analyses the regulatory boundaries between hygiene products, biocidal products, and veterinary medicinal products. Market trends and future developments shaping the sector are also examined.

Key words:

Pet care market, pet cosmetics, animal grooming, EU regulatory requirements (BPR, REACH, CLP, VMP), regulatory classification of pet care products, safety assessment of animal products

INTRODUCTION

The market for animal care and protection products is experiencing sustained growth both in Poland and worldwide. This expansion, particularly evident over the last decade, is largely driven by significant societal changes, including the increasing number of companion animals, growing awareness of animal welfare, and the continuing trend of humanisation of the human–animal relationship. As pets are increasingly regarded as integral members of the household, consumer expectations regarding product quality, safety and functionality have risen substantially. As companion animals are increasingly regarded as integral members of the household, consumer expectations regarding the quality, safety, and functionality of pet products have risen substantially. Pet owners increasingly expect products that offer levels of safety, efficacy, and quality comparable to those associated with products intended for human use.

MARKET SIZE AND GROWTH DYNAMICS (1,2)

The global pet care market has experienced remarkable growth over the past decade and continues to demonstrate strong long-term potential. According to industry analyses, the global pet care sector was valued at approximately USD 270–315 billion in 2025. Long-term forecasts indicate continued expansion, with the market expected to reach USD 430–480 billion by 2035, corresponding to a compound annual growth rate (CAGR) of approximately 6–7%.

This growth rate exceeds that of many other consumer goods sectors and is primarily driven by the increasing number of pet-owning households, rising expenditure on animal health and welfare, and the rapid development of distribution channels, particularly e-commerce.

From a regional perspective, the European market also exhibits strong growth potential. Industry reports estimate the value of the European pet care market at approximately USD 45–80 billion in 2025, with projected CAGR figures ranging between 5% and 7% over the coming years. Some analyses suggest that Europe accounts for as much as 25–30% of global pet product and service sales.

MARKET STRUCTURE OF PET CARE AND PROTECTION PRODUCTS

The market for pet care and protection products is characterised by considerable product diversity, reflecting the wide range of animal species and their varying health, welfare, hygiene, and husbandry requirements. The sector encompasses products intended for companion animals, livestock, and working animals. However, the companion animal segment remains the fastest-growing and most commercially significant category.

Based on their intended function, several principal product categories can be identified.

The first category comprises **grooming, care and hygiene products**, including shampoos, conditioners, skin and coat care products, as well as products intended for eye, ear, and paw hygiene. In commercial practice, these products are frequently marketed as "pet cosmetics"; however, this term has no legal status under current European Union legislation. Such products generally do not claim medicinal or biocidal properties, and their primary purpose is to maintain hygiene, improve coat and skin condition, and enhance animal comfort and well-being.

A second major category includes protective products, such as repellents, antiparasitic products, insect repellents or insect control products and disinfectants used in animal environments. Their intended function may involve either protecting the animal itself or controlling harmful organisms in its surroundings.

A separate category comprises specialised health-supporting products intended for the prevention or treatment of diseases and health disorders in animals.

REGULATORY FRAMEWORK AND MARKET DEVELOPMENTS

Despite the rapid expansion of the sector, neither European Union legislation nor national legal frameworks provide a single, harmonised regulatory category covering pet care and protection products.

Importantly, each of the product categories described above may fall under different regulatory regimes depending on its intended purpose, claimed mode of action, chemical composition, and conditions of use. Consequently, products with similar physical characteristics or comparable end uses may be subject to entirely different regulatory requirements.

Depending on their characteristics, such products may be classified as:

- chemical mixtures intended for cleaning, washing, or maintaining animal hygiene and cleanliness;
- biocidal products;
- veterinary medicinal products.

The boundaries between these categories are often unclear, creating significant interpretative challenges for both manufacturers and regulatory authorities.

This regulatory complexity represents a major challenge for companies operating within the sector. Incorrect product classification may result in administrative sanctions, product withdrawal from the market, substantial costs associated with reformulating regulatory documentation, or even the need to obtain product authorisations under a different regulatory framework. As a result, regulatory assessment at the product development stage is becoming increasingly important.

Alongside regulatory challenges, several important market trends continue to shape the development of the sector. These include increasing consumer demand for natural and environmentally friendly products, hypoallergenic formulations, and products inspired by innovations in the human cosmetics industry. Manufacturers are also placing greater emphasis on sustainability, ethical sourcing of raw materials, and ingredient transparency.Such trends may further complicate regulatory classification, as innovative formulations and novel marketing claims do not always fit neatly within existing legislative frameworks.

Overall, the market for pet care and protection products combines significant growth opportunities with considerable regulatory complexity. Successful participation in this sector requires not only an understanding of evolving consumer preferences but also a thorough knowledge of applicable legal requirements and proactive regulatory risk management.

ABSENCE OF A "PET COSMETIC" CATEGORY IN EUROPEAN UNION LAW (3,4)

Within European Union legislation, there is no separate legal definition of a "pet cosmetic". Regulation (EC) No 1223/2009 on cosmetic products applies exclusively to human use, and the definition of a cosmetic product explicitly refers to its application to external parts of the human body. Consequently, animal care products cannot be classified as cosmetics under EU law.

Despite the absence of a dedicated regulatory category, manufacturers of such products are still required to ensure product safety. In practice, their safety is assessed under general chemical legislation, including in particular:

- **REACH (EC) No 1907/2006** (5) – establishing obligations for the registration of chemical substances, safety assessment of ingredients, and supply chain responsibilities;
- **CLP (EC) No 1272/2008** (6) – concerning the classification, labelling and packaging of chemical mixtures. Even products not classified as hazardous must undergo formal classification assessment;
- **The Polish Act on Chemical Substances and Their Mixtures** (7) – implementing EU provisions and regulating the use of chemicals on the national market.

This means that pet care and hygiene products require both chemical composition assessment and supporting safety documentation.

CLEANING PRODUCTS (8)

Cleaning products used in the pet care sector, such as agents for washing and refreshing litter trays, cages, bedding, or for laundering textiles and pet accessories, are generally classified as detergents, provided their function is limited to removing dirt and neutralising odours.

In such cases, they fall under detergent legislation and general chemical regulations, including REACH and CLP. However, it should be emphasised that claims related to antibacterial, disinfecting, or antimicrobial properties may result in classification as biocidal products, thereby subjecting them to significantly more stringent regulatory requirements.






BIOCIDAL PRODUCTS (9,10)

Some animal-related products may meet the definition of biocidal products under Regulation (EU) No 528/2012 (BPR). This primarily applies to products with repellent or controlling effects on harmful organisms.

Typical examples include:

— disinfectants for animal environments,
— insect-repellent, insecticidal products (e.g. mosquitoes, flies) or parasiticides (e.g. fleas, ticks).

Classification as a biocidal product depends not only on the manufacturer's claims but also on the actual mode of action and the active substances used. Biocidal products are subject to strict regulatory requirements, including:

— authorisation before placing on the market,
— risk assessment for human health, animal health and the environment,
— provision of evidence of efficacy and safety.

Many active substances used in biocidal formulations, for example against parasites (e.g. permethrin, imidacloprid, fipronil), have toxicological profiles requiring assessment not only in terms of user safety (animals and their owners) but also environmental impact (e.g. toxicity to bees and fish).

VETERINARY MEDICINAL PRODUCTS (11-13)

Products that claim a therapeutic effect or disease prevention in animals are regulated as veterinary medicinal products under Regulation (EU) 2019/6 (VMP) and the Polish Pharmaceutical Law.

Classification criteria include, among others:

— influence on physiological functions through pharmacological, immunological or metabolic action,
— claims of treating or preventing disease.

Examples of veterinary medicinal products include treatments and preventive products for animal diseases, including parasitic infections, as well as medicated shampoos and specialised skin, coat, and oral care formulations.

These products are subject to significantly stricter regulatory requirements than care products, including mandatory studies confirming safety and efficacy, as well as authorisation requirements.

BOUNDARIES BETWEEN CATEGORIES – THE "BORDERLINE" CHALLENGE

One of the greatest challenges for manufacturers of pet care products is correct classification, particularly for products that may fall into multiple categories (so-called borderline products).

Key examples include:

— **Shampoos and coat care products with anti-dandruff or soothing claims** – remain care products unless therapeutic claims are made; disease treatment claims may reclassify them as veterinary medicinal products.
— **Sprays and foams for paws or skin** – if limited to protection or care, they fall under chemical legislation; disinfecting or antimicrobial claims may shift them into biocidal products.
— **Ear and eye hygiene products** – considered hygiene products if limited to cleansing; claims of treating inflammation may classify them as veterinary medicinal products.
— **Blankets, collars, mats, beds and other accessories with active substances** – may be treated as articles; however, incorporation of biocidal active substances, particularly repellents, may result in classification as biocidal products.
— **Insect or parasite control products** – may be classified either as biocidal products (control/eradication) or veterinary medicinal products (prevention or treatment of disease).
— **Litter tray and bedding cleaning products** – generally detergents unless antimicrobial or antibacterial claims are made, which may shift them into the biocidal category.

These examples demonstrate that regulatory boundaries are fluid, and correct classification depends not only on the product form or intended use, but primarily on its

Product category	Legal basis	Examples	Classification criteria
Care / hygiene products	• No legal definition of pet cosmetics • REACH • CLP • Act on Chemical Substances and Their Mixtures	• Shampoos, conditioners • skin and coat care products • eye/ear/paw hygiene products	Care and hygiene function; no therapeutic or biocidal claims
Cleaning products	• Detergent Regulation (EC) No 648/2004 • REACH, CLP	• Litter tray, bedding and cage cleaners	Cleaning and deodorising function
Biocidal products	• BPR (EU) No 528/2012 • National biocidal legislation	• Insect repellents • disinfectants • parasiticides	Confirmed biocidal action (repelling, destroying, controlling harmful organisms); active substances
Veterinary medicinal products	• VMP (EU) 2019/6 • Pharmaceutical Law	• Anti-parasitic medicines • dermatological treatments	Treatment or prevention of disease; pharmacological, immunological or metabolic action

claimed function, active substances, physiological effects, and product presentation and communication.



Shampoo

CARE OR PROTECTIVE FUNCTION

CARE → CHEMICAL MIXTURE

PROTECTIVE FUNCTION → ELIMINATES REPELS → BIOCIDAL PRODUCT

PROTECTIVE FUNCTION → TREATS PREVENTS → MEDICINAL PRODUCT



Cleaning products for litter boxes and pet bedding

CLEANING OR DISINFECTION

CLEANING → DETERGENT

DISINFECTION → BIOCIDAL PRODUCT

The examples discussed above demonstrate that the boundaries between regulatory categories are fluid, and that the correct classification of a product depends not only on its physical form or intended use, but above all on the claimed effects, the active substances used, the product's function, and the manner in which it is presented and communicated to consumers. Therefore, each classification requires an individual and detailed assessment of all these elements.

To correctly assign a product to the appropriate regulatory category, manufacturers must conduct a comprehensive analysis of its characteristics and mode of action. Of particular importance are the product's claimed effects and intended function, as well as its method of use and purpose, which determine whether the product should be considered a care, protective, or medicinal product. A detailed assessment of the chemical composition is also essential, including the presence of active substances and their mechanism of action. Another critical element of the classification process is the way in which the product is presented, including the wording used on labels, instructions for use, and marketing communications, as specific claims and statements may determine the applicable regulatory framework.

Incorrect regulatory classification of a product may result in significant legal and business consequences. In extreme cases, it may lead to the withdrawal of the product from the market or the imposition of administrative penalties by competent supervisory authorities. It often also requires the redesign of technical documentation, labels, and marketing materials, generating additional costs and extending the process of reintroducing the product to the market. Non-compliance with applicable regulations may further result in a loss of consumer and business partner confidence, as well as significant delays in the commercialization of new products. In the rapidly growing pet care sector, such risks can have a substantial impact on competitiveness. In practice, even subtle differences in product claims can fundamentally change the regulatory category assigned to a product.

CHALLENGES FOR MANUFACTURERS

The production and market introduction of animal products involve numerous regulatory and operational challenges. A key factor is the clear and legally compliant formulation of product claims, as these determine the regulatory category of the product and influence the requirements for market authorization. Manufacturers must also provide evidence of safety and efficacy, ensure proper labeling, and continuously monitor legislative developments, including regulations concerning biocidal products (BPR), chemicals (REACH and CLP), and veterinary medicinal products (VMP).

An additional challenge is educating consumers on the correct use of products, which is essential for ensuring the safety of animals, users, and the environment. Effective communication and clear instructions for use help minimize the risk of improper application of chemical preparations, thereby protecting animal health as well as the manufacturer's reputation.

MARKET TRENDS AND FUTURE REGULATION

In the coming years, the pet care market is expected to continue its dynamic growth. Several key trends are likely to shape the sector:

- Increasing owner awareness – Pet owners are placing greater emphasis on hygiene, grooming, and preventive healthcare, driving demand for more advanced and scientifically supported products.
- Natural and sustainable products – In line with the global sustainability agenda, demand is growing for products based on naturally derived ingredients, environmentally friendly formulations, biodegradable packaging, and reduced use of potentially irritating substances.
- Product personalization – Manufacturers are increasingly developing products tailored to the specific needs of individual animals, taking into account factors such as breed, age, coat type, skin condition, and lifestyle.
- More stringent regulatory requirements – Regulatory

expectations, particularly for biocidal products and veterinary medicinal products, continue to increase, requiring manufacturers to ensure accurate product classification, robust technical documentation, and effective post-market compliance.

— Expansion of e-commerce – The continued growth of online sales highlights the importance of providing consumers with clear product information and education, particularly regarding product safety and correct use.

Together, these trends are expected to shape the future of the pet care industry, driving innovation, strengthening regulatory compliance, and increasing the importance of transparency and effective communication with consumers.

CONCLUSION

The absence of a unified "pet cosmetic" category in EU law means that animal care and protective products may fall under different regulatory frameworks, including chemical legislation, biocidal product rules, or veterinary medicinal product regulations. Correct classification requires thorough knowledge of legal frameworks, as well as detailed analysis of product claims, function and chemical composition.

In a rapidly growing market, transparency, safety, efficacy and regulatory compliance are becoming increasingly important. These factors are essential for maintaining consumer trust, ensuring proper market operation, and supporting sustainable development of the pet care sector in the coming years.

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