SUZIRIA
Pet Care Group

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# Sharing market news and summarizing 2025

## Global pet market trends

GROWTH OF THE GLOBAL PET FOOD MARKET

According to Euromonitor International, the global pet food market will grow steadily, reaching an estimated **$150 billion** in retail sales by 2030 (from about **$131.5B** 2025 prices), and the Asia-Pacific region will lead overall growth.

FOCUS ON HEALTH OFFERS BRANDS, NOT ALL NEW MARKETS

Demand for pet food remains stable, but rising costs and supply chain challenges are pushing brands to focus on premium products. Manufacturers are developing more tailored, of-stage pet foods, emphasizing ingredients, functional benefits, and offering functional, preventive, and offering new products from users' pet parents' expectations.

Euromonitor International

KEY GROWTH SEGMENTS

**In 2025, wet food accounted for 47% of the global market, with dry food and specialty foods nearly split between the two pet groups. At the same time, the small dog segment is growing the fastest, with projections around 21% between 2026 and 2030.**

Euromonitor International

DIRECT PROTEIN FOODS & DRINKING TREND

The trend of consuming pet food segment is largely developing worldwide, and according to estimates by Euromonitor International, **the pet food market is growing at 5% annually**. There are currently over 150 brands and more than 1,000 products in the direct protein food segment.

Euromonitor Magazine

FREEZE-DRIED PET FOOD FROM NATURE PRODUCT TO MEAT FORM

The freeze-dried pet food market grew by 8.1% in 2024, and **between 2025 and 2030 it is expected to grow at a 7.8% annual rate**, with a total market valuation of up to $3.5 billion by 2030. The growth in demand is driven by interest in natural, high-quality, minimally well and retains maximum nutrients.

FUNCTIONAL NUTRITION AND A FOCUS ON HEALTH

Pet health will remain a key trend in 2026, according to Euromonitor. **Over 70% of pet owners are willing to pay more for foods that maintain or improve their pets' health.**

PET Food Processing

Supplements are in the spotlight: 53% of pet owners plan to buy more vitamins and supplements, as the share of pet owners — 8% increase from 2020. Over the past five years, pet ownership has increased by 18% across Europe and 10% among cat owners, indicating a long-term shift in pet care.

American Pet Products Association

TRENDS IN THE UKRAINIAN PET MARKET

According to Suzira Group, in 2025 the Ukrainian pet market continued to grow in monetary terms and by 7% in physical volumes, **reaching a total market value of $1.5 billion**.

In 2026, Suzira Group predicts further growth in the market, with 5% and 4% growth in monetary terms — reaching approximately $1.6 billion and 1.6 million respectively. The market growth is expected in the feed category, while the non-food segment may experience slight growth.

The primary driver of the market remains the pet owners' strong emotional bond with their family — pets play a vital role in the shift away from "table scraps".

Growth in volume will mainly come from the feed segment, where the greatest demand will be driven by premium products.

Despite the population decline due to emigration, the number of households in Ukraine is expected to remain stable. A slight increase in the number of households with dogs is anticipated, while the number of households with cats is expected to remain unchanged — this figure is already high compared to other European countries. For reference, the number of households with Poland 7.3 million, Romania 4.6 million, and Hungary 4.2 million.

Euromonitor International

## SUZIRIA

For Suzira Group, 2025 was a period of stabilization following a phase of active growth. Despite challenging conditions, the company maintained its market position and continued its development. This report reflects the key results of production operations, the actions taken, the lessons learned, and important investments in processing, production, implementing new technologies, and preparing for the next stage of the group's development.

### How global trends closely by Suzira Group's international pet industry shows.

In the spring, the Suzira Group participated in the Zoomarket Ukraine, held in November as part of the **Pet Show (CIPS 2025)** — one of the largest pet industry events in Ukraine.

The exhibition brought together approximately 150 companies and distributors from over 150 countries and attracted more than 100,000 visitors. It served as a platform for the exchange of ideas, trends, and new products, technologies, and pet care. During CIPS, our team met new partners and customers and sought solutions to create even greater value for Ukrainian pet owners.

**Forbes Ukraine honored Polina Evsikina with the "Entrepreneur of the Year 2025" award in the "Pet Business" category.**

This award recognizes leadership, vision, and the ability to transform the business during challenging times for the country. Polina's work at the helm of Suzira Group has put about one million — it reflects the efforts of the Suzira Group team of over 1,000 people, our partners, our pet owners and their pets who trust and show our brands and network every day. Every achievement is a result of the collaborative development of the Ukrainian pet market.

**In September 2025, Suzira Group launched its first grant program to support small pet businesses**

We received over 120 applications from veterinarians, veterinary clinics, and veterinary pharmacies across Ukraine. **The winners — Veterinary Clinic Dog Olympus, Vetlab, and Veterinary Pharmacy Vetlab — received a grant of $1,000 each.**

Alongside the grant, the winners received **free advertising on Suzira Group's social media**, and the winner received rehabilitation equipment worth approximately $2,500 from the Nova Rehabilitation Center.

The program finalist — **the KYLIN.PET Group, a manufacturer of self-warming collars for animals** — gained the opportunity to place its products (Ukraine's largest Mediterian pet store chain) on the shelves of its partner stores with the Tetra creative agency.

Additionally, we conducted a series of internal training sessions for our teams, based on the results and challenges of the program finalists. The training sessions were led by **Dmytro Kyrylenko, Sofia Bondar, and Natalia Dun, among practical experience** in business development, marketing, and sales, working with retail chains, communications, and CSR projects, and implementing sustainable business models and intellectual property protection. We also continue to engage with other stakeholders regarding potential collaboration and product presentation opportunities.

## SUZIRIA Ukraine

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| **6 000** | **6 000** |
| B2B customers receive products from suppliers in Europe, America and Asia | increase in the number of registered students at Suzira Academy |
| **21,600** | **30%** |
| pet care shipped to B2B customers in 2025 | increase in the number of registered students at Suzira Academy |
| **30** | |
| suppliers | |

### Our joint project with VitPO Group and Tetra creative agency, called "Feel Good, Feel Stylish" for the Brand — won an Effie Ukraine award in the Corporate Reputation category.

For many years, the Suzira Group team has exclusively supplied Brit and Brit Care products and has also been responsible for their marketing and brand building in Ukraine. The "Feel Good, Feel Stylish" initiative was created to help Brit Ukraine strengthen its position and new homes and to promote adaptive and responsible attitudes toward animals.

VIEW THE TEEL YOURS FIND YOURSELF VIDEO CARD

**We launched an updated B2B platform — a tailored portal that has become a full-fledged workspace with all key tools in one place.**

We automated promotional offers with personalized discounts, set up flexible specific payment rules, integrated EDI, and, ensured financial transparency with real-time access to balances, transactions, discounts and mutual settlements.

The ordering process has become simpler and faster: customers can place orders, track payments, or upload catalog with extended descriptions and high-quality images, and, in the future, create custom product bundles.

During the year, we also updated the product warranty service model and implemented a new, more transparent and efficient process.

**All of this is aimed at building a transparent, convenient, and responsible service ecosystem centered on partner trust and the comfort of end Suzira consumers.**

## SUZIRIA Brands

Our own brands continue to grow actively in international markets:

IT MARKET PRESENCE

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| **5 BRANDS** | |
| Beaphar, Vitakraft, Trixie, Special One, and Buddy Boo — are exported to international markets | |
| **TOP UNIQUE SKUS** | |
| Over the past year, 7 products have reached pet households abroad — 100 more than last year | |

**Suzira Brands has triped in international markets: Ukraine, Poland, Romania, Bulgaria, and the Netherlands. Beaphar gains total project for the production of wet food for the pet partner VIRTO Group (Brit brand).**

The Halftimpf brand has expanded listings with international retail chains Auchan (France) and Carrefour (Romania).

A D2C website for the Savory brand has been launched in Poland

## master zoo

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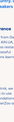
| **200+** | **17** |
| pet stores across 26 cities | grooming salons across 7 cities |
| **14** | **24%** |
| new exclusive brands added | NPS |

Master Zoo has launched a **new loyalty program for the benefit of dog and pet grooming**.

The educational content was developed by veterinarians and aims to teach how to properly and safely care for their pets at home. The program is currently available on MASTER Groomers.

**Master Zoo has also became a partner of a dog adoption series within the Kyiv Dog Festival**, which brought together the dog rescue welcome home from Nevskyi with useful products to support the adoption process and support of their new four-legged friend.



**Together with LUN Mini, Master Zoo has launched an interactive pet-friendly map of Kyiv, bringing together over 200 locations, including pet-friendly cafes, parks, and stores, where pet owners can comfortably and safely walk their dogs.** The project aims to support the development of a city where life with a responsible pet walking, as well as by contributing to creating a barrier-free and comfortable environment for people with disabilities. Master Cooking snacks are also prepared the map by adding more pet-friendly locations across the city — from shopping malls and cafés to hotels and veterinary clinics — and later scale the project to other Ukrainian cities.

## Social projects

**Throughout the year, together with Ukrainians, we launched the "Humane Education and Socialization" program for children and teachers, aimed at building a humane society and educating relevant animals. In the first six months of the program, we achieved the following results:**

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| **14** | **190+** |
| lessons for primary and secondary schools | lessons delivered in schools across Ukraine |
| **3 000+** | **650+** |
| children engaged in classes and special events | teachers completed specialized training and received professional development certificates |

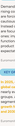
We also submitted two study guides for approval for integration into the national curriculum — an important step toward the verification of materials by the Ministry of Education of Ukraine.





**We have launched a special educational video on Humane Education and Socialization, supported by SOS Children's Villages Ukraine.**

During the excursions, children learn interesting facts about pets and become familiar with the Ukrainian breeds of dogs, cats, fish, rodents, and parrots. So far, we have conducted seven excursions for pet owners in Kyiv, Brovary, Vyshneve, and Fastiv.



In 2025, we presented a unique cultural project — **"Journey to Very Kind Animals", created in collaboration with Wild Tribes of Ukraine and Ukrainian Pet Show**. It is about a lazy whose life is forever changed after meeting with his future best friend — a stray dog named Sonya. The project aims to promote pet adoption and raise awareness of the issue of homeless animals. Since its premiere in October, it has already been seen by more than 1,500 viewers.

As part of the Suzira Pet Care's Foundation's work in 2025, we focused on supporting animal protection organizations, "Superhero" animal rehabilitation centers, and veterinary and vaccination programs — by November, 1,247 animals had been sterilized. We also organized a charity run on the "Mukha Kyiv" stadium and launched a crowdfunding campaign in support of the "Sirkom" SOS. It raised a total of UAH 1,000,000 in cash and non-food donations, and we plan to continue this initiative.

## Events

**In 2025, the Suzira Group team participated in over 10 industry events, representing the Ukrainian pet market and learning from, as well as exchanging experience with, our international partners. In the fourth quarter, we took part as speakers in:**

### RESTART Business Conference

Together with business leaders from Giants Family, EVOS Group, Bull, and AMUR, we shared candid stories of business restarts, lessons learned, and the mindset needed to rebuild — as well as ways leaders maintained strong the way.

### Digital Retail Forum 2025

Together with our partner eSpace, we presented our experience in implementing personalized product recommendations to increase conversion in the MasterZoo online store.



### Retail Expo

We presented case studies showing how MasterZoo remains an empathetic brand that uses loyalty programs to maintain partnerships through personalized promotions, clear value for pet parents, and consistent communication, and an unexpected approach.