



Pet Food Market Trends July 2021



**For more information, please contact
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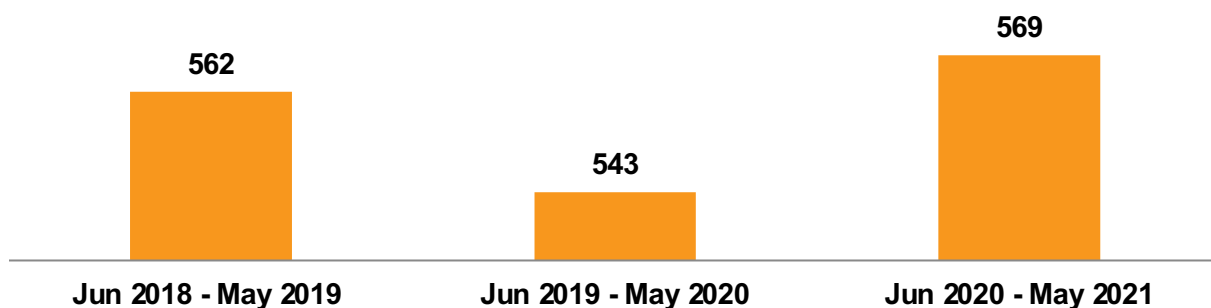
Source:
Michael Sellitto, Mintel, Contributing Editor
Mintel Global New Products Database (GNPD)



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US: Launch Activity of Pet Food, Jun 2018 – May 2021

■ # of Launches



US: Top Fruit Ingredients for Pet Food Launches, Jun 2018 – May 2021

Fruit	Jun '18 – May '19	Jun '19 – May '20	Jun '20 – May '21	Total Sample (# of products)
Cranberry	54	70	46	170
Blueberry	44	57	46	147
Apple	39	42	29	110
Banana	3	9	9	21
Carob	6	5	4	15
Pomegranate	8	4	1	13
Apple Fiber	0	3	4	7
Raspberry	2	5	0	7
Lime Juice	2	1	2	5
Blackberry	2	2	1	5



Most Active & Highest Growth Flavors for Pet Food and Treat Launches in the US - June 2018 – May 2021

Sample Size: 1,674 products

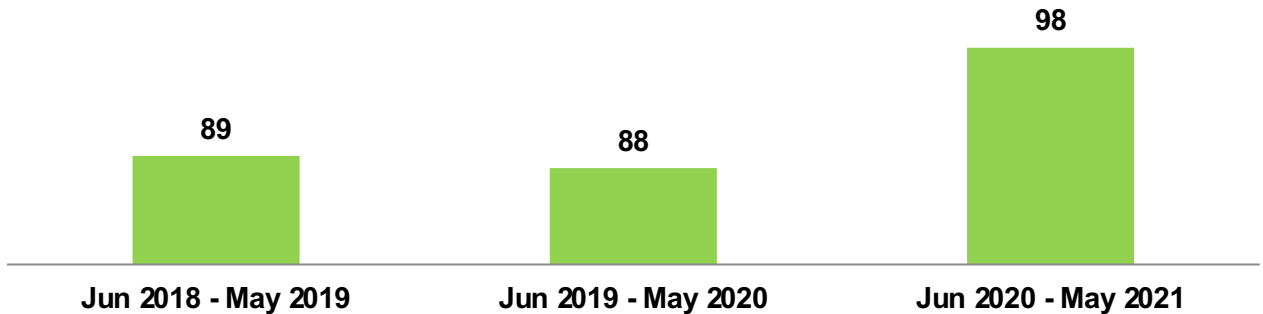
Ranked by # of Launches, % of Total Sample			
Rank	Flavor	# Launches	Total Sample
1	Chicken	253	15.1%
2	Beef	122	7.3%
3	Peanut Butter	57	3.4%
4	Salmon	52	3.1%
5	Bacon/Lardon/Panchetta/ Speck	32	1.9%
Ranked by % Growth of Launches			
Rank	Flavor	% Change: Jun 2018 – May 2021	
1	Pumpkin/Squash	500.0%	
2	Sweet Potato/Kumara	300.0%	
3	Bacon/Lardon/Panchetta/ Speck & Cheese	200.0%	
4	Cheese	200.0%	
5	Blueberry & Peanut Butter	200.0%	



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US: Launch Activity of Pet Food w/ All-Natural Claim, Jun 2018 – May 2021

■ # of Launches



Natural Pet Foods Are In Demand

Many pet owners consider their status as 'pet parents' to be an important part of their personal identity. The same values they look for in food they buy for themselves and their families also applies to the foods they buy for their pets.

36% of pet owners in the US look for all-natural pet foods.

While the all-natural claim is an important purchase driver for pet owners, other clean-label ingredient claims have garnered a bigger focus in launch activity over the past year. For example, brands have ensured that meat is the primary ingredient in recipes, have limited the length of ingredient lists and have also highlighted the absence of animal byproducts.



Base: 1,383 internet users aged 18+ who purchase dog or cat food/treats

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Source: A Year of Innovation in Pet Food & Products, 2021; Lightspeed; Mintel Global New Products Database (GNPD)



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2021 Pet Food Launches w/Functional Pet Claims

I and Love and You Nude Super Food. It is said to support healthy skin and coat with omega 3 and omega 6 and offer digestive support. This product **contains peas, sweet potatoes, pumpkin, carrots, and apples**



Purina Beyond Simply This simple cat food - features accents of **cranberry** and claims this product promotes healthy weight, hairball control and immune support. It contains natural probiotics for digestive health and rich in antioxidant

Heritage Ranch by H-E-B Adult Salmon & Oatmeal Recipe Dog Food for Skin + Digestion Support is said to feature real salmon as the number one ingredient. This product contains the following nutrients: prebiotic fiber and probiotics to support healthy digestion. Contains **Blueberry, Carrot, and Cranberry**





Innovation Focuses On Preventative Health

Most pet owners are committed to ensuring that their pets live a long and healthy life, and consequently, they look for a variety of functional health and wellness benefits in the pet food and treats they purchase. **88% of pet owners in the US say it is important to take preventative measures to protect a pet's health.** With veterinary bills typically high, pet owners are looking for support in managing their pet's health in a preventative way. This 'spend a little to save a lot' approach is even more appropriate, considering the widespread unemployment and economic instability because of the COVID-19 pandemic. Pet food and treat brands are responding to this interest in preventative health by launching products that feature multiple health benefits.

Base: 1,452 internet users aged 18+ who are pet owners

Fruit can be a great source of fiber in pet food formulations to promote gut health

Learn about fruits role in health and disease prevention from our webinars.

learn more

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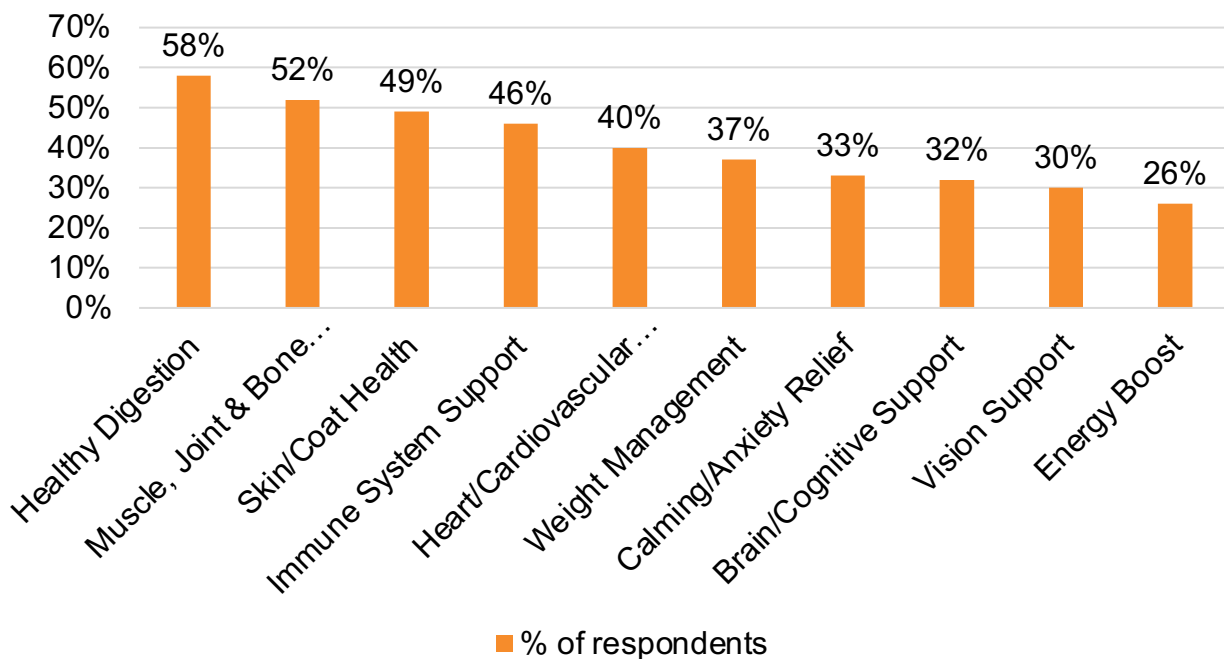
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Gut Health is Linked to Some of Pet Food Purchases' Biggest Health and Wellness Priorities

The potential power of gut health as a pet food marketing claim grows out of its connection to many different aspects of pet health that are already important to pet owners.

Digestive health in general is a top-of-the-mind health and wellness concern among pet owners, with nearly six in 10 saying that they would like to see the claim for the pet food and treats they purchase. In addition, a variety of other functional benefits linked to gut health, such as skin and coat health, immunity support, weight management and even calming and anxiety relief, are also top priorities for pet food purchasers.

US: Interest in Health & Wellness Claims in Pet Food & Treats, March 2021



Base: 1,398 internet users aged 18+ who purchase pet food/treats



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Source: Pet Food's Take on Gut Health". Lightspeed, Mintel





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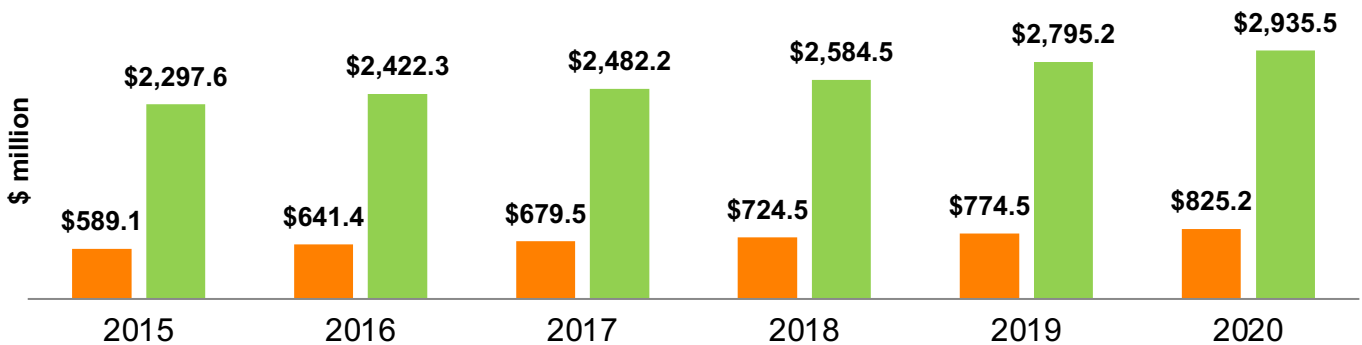
Beyond Food: Treats Continue to Drive Growth

Treats account for less than one fifth of the total pet food market but drive a disproportionate share of growth. Multi-outlet sales of dog treats rose 28% between 2015 and 2020, while cat treats jumped 40% from a smaller base.

The fact that regular treating is far from universal among pet owners means that the segment (encompassing regular treats and related products including toppers) has substantial room for further growth.



US: Multi-Outlet Sales of Dog & Cat Treats, 2015 - 2020



Source: IRI InfoScan Review



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Source: "Treats and Toppers Offer a Path for Growth"; IRI InfoScan Reviews



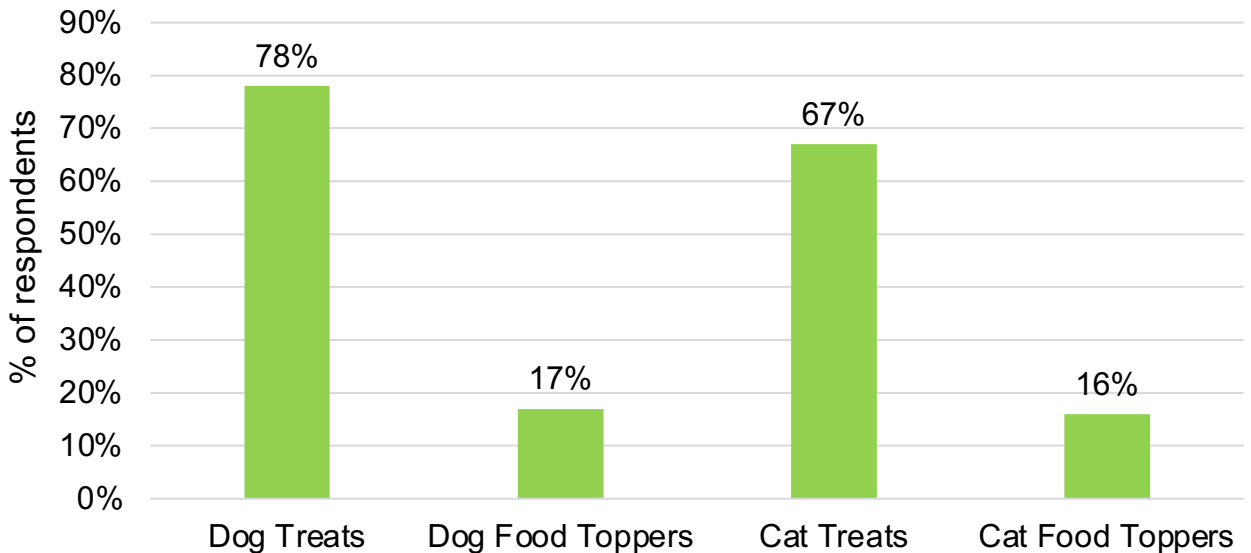


Topper Incidence on the Rise and Room to Continue Growing

Both dog and cat treats enjoy high purchase incidence, suggesting that the key to further growth lies in increasing treating frequency. Purchase incidence for toppers is far lower but rising. **A key task for marketers is to build awareness of toppers and the benefits they offer, such as palatability or added nutrition.** Both treats and toppers can be ways for owners to strengthen bonds with their pets as they spend more time with them during the pandemic.

Retail merchandising strategy could play an important role in building awareness and trial of treats and toppers. Placing food, toppers and treats together could make it easier for pet food shoppers to see the different roles that each of these product types plays in a care and feeding regimen.

US: Incidence of Dog and Cat Treats and Topper Purchase, April 2020



Base: 1,085 internet users aged 18+ who own a dog and who purchase pet food/treats, 681 internet users 18+ who own a cat and who purchase pet food/treats



Toppers of Interest and Featuring Fruit



Contains the following fruits & vegetables; pumpkin seed, organic cranberries, organic spinach, organic broccoli, organic beets, organic carrots, organic squash, and organic blueberries



Contains the following fruits & vegetables; sweet potato, apple, barley, and spinach



Contains the following fruits & vegetables; sweet potato, apple



Three simple ingredients; apples, water, and pumpkin puree



Aligning Sustainability and Nutrition

As pet food purchasers demand better quality, manufacturers have responded with claims that the foods are free of meat byproducts or made with only the best cuts of meat, reinforced by on-pack images of neatly trimmed steak and chicken breasts.

The suggestion that meat byproducts are undesirable has helped fuel the premiumization of the category but may have made it more difficult for brands to shift to a more responsible source of protein.

One notable effort in this direction is Halo Holistic Garden of Vegan Recipe for Adult Dogs. It is made with holistic plant protein, offering complete and balanced daily vegan nutrition for dogs. The product contains plant-based ingredients loved by sensitive dogs, including high protein peas, chickpeas, barley, and oats. It is complemented by antioxidant and vitamin rich fruits and vegetables such as peas, sweet potato, carrot, celery, lettuce, spinach, cranberry, blueberry, and apple.





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The Future of Pet Food: The Now, The Next & Beyond

Where we are now

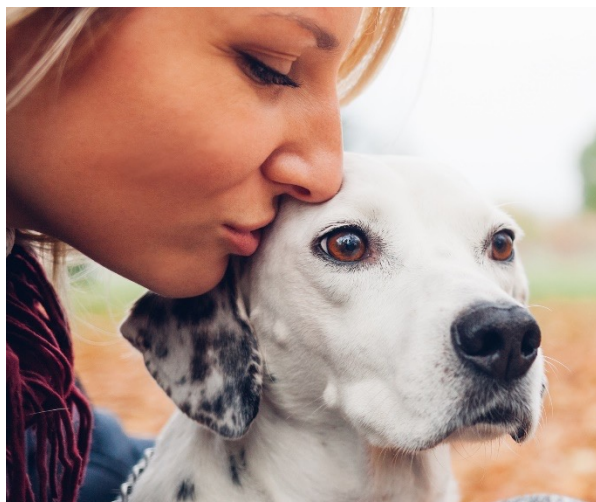
With pet owners behaving more like pet parents, there is exciting innovation in clean label and age-specific foods, while more sustainable products have potential.

In the next two years

More pet food brands will strive to achieve a balance between nature and science, while also working on reducing their ecological paw print. As Millennials forge stronger bonds with cats, pet food brands will give more attention to the feline side.

In five years and beyond

While lab-grown meat gains visibility in pet food, opportunities arise for products and services that foster emotional connections, provide novel experiences and help pet owners to monitor and manage the mental health of their pets.



As Millennials forge stronger bonds with their pets, brands will balance nature and science, foster emotional connections, and reduce the ecological paw print.