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Feeding the future: exploring emerging trends in pet food



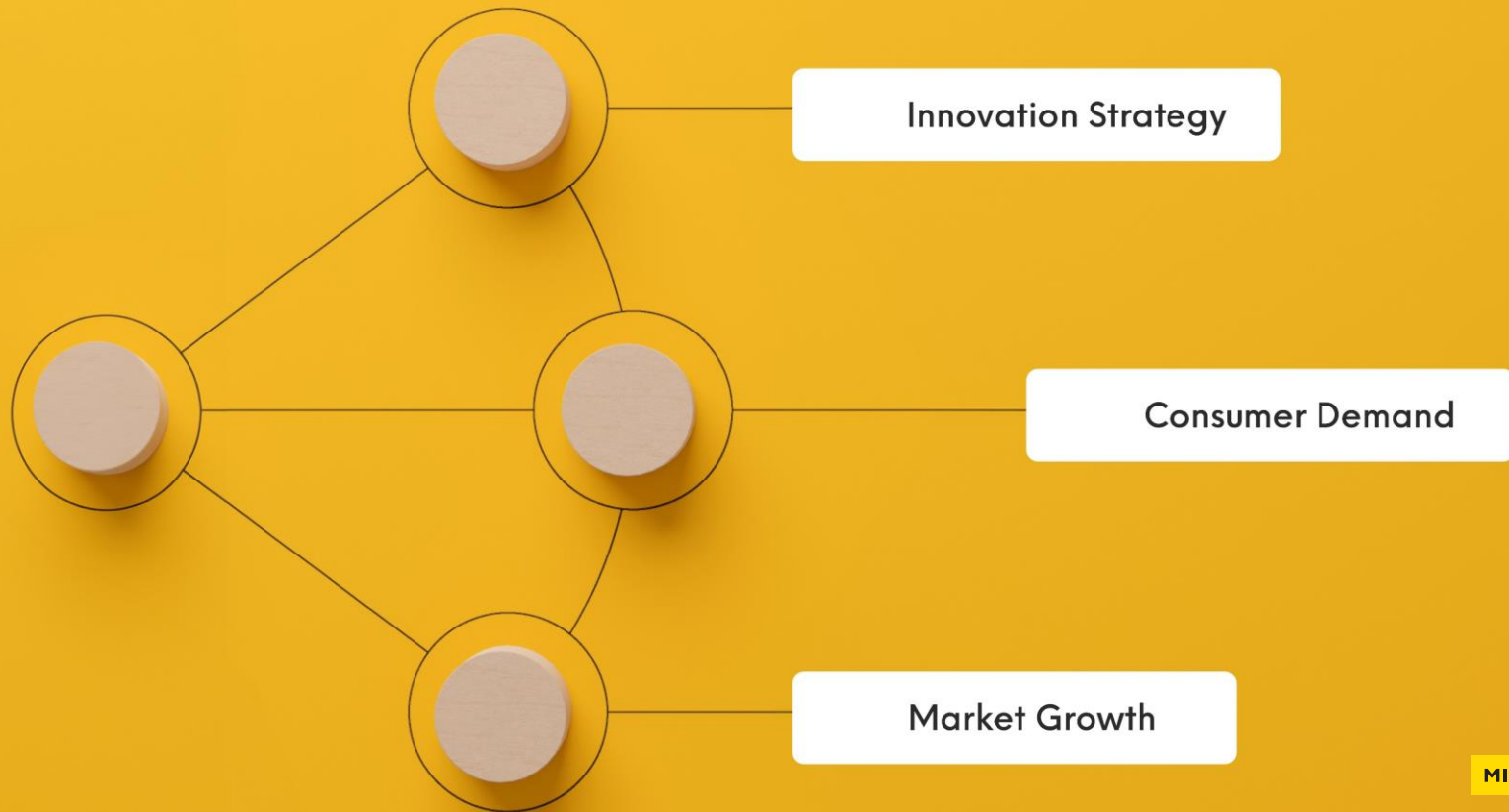
Kate Vlietstra
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Experts in what consumers want and why



OUR CAPABILITIES

Through a deep understanding of markets, innovation and consumers, Mintel Consulting delivers customised solutions focused on:





1

The fur baby phenomenon

2

The wellbeing revolution

3

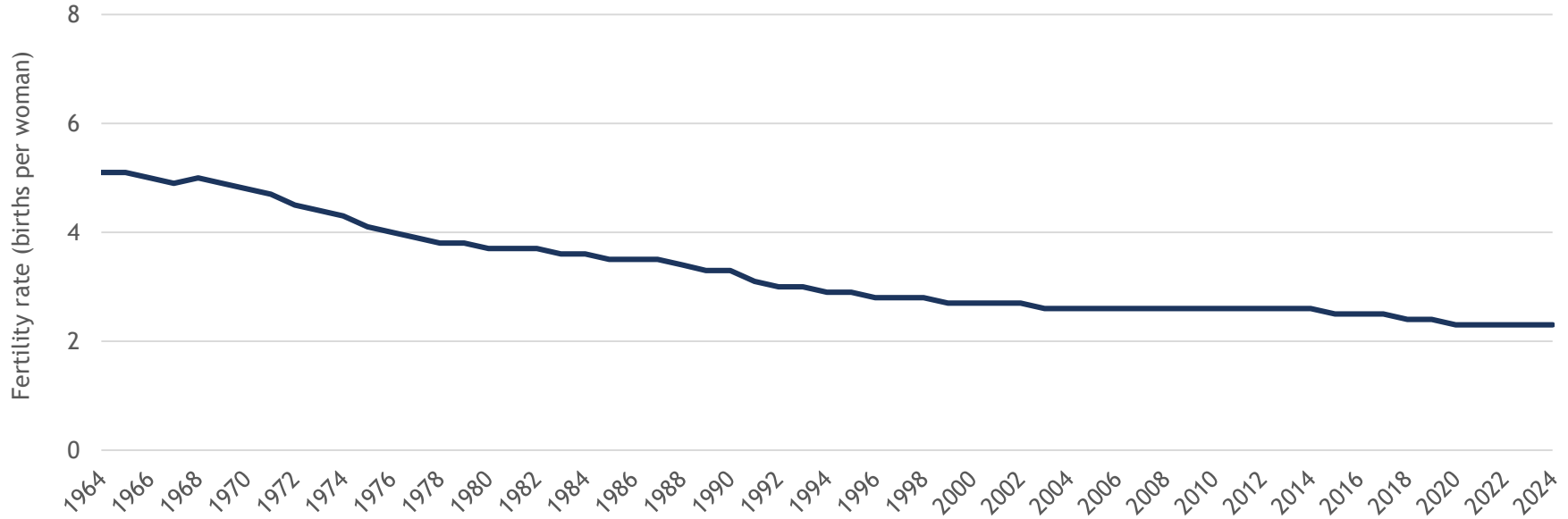
The climate conundrum

The fur baby phenomenon

Gen Alpha will grow up focusing more on pets

As the birth rate plummets, pets will gain more attention

Global: total fertility rate, 1964-24



Source: United Nations Population Division, 2022 revision

Are there more pets than toddlers in China?

China could soon have more pets than toddlers. Why that's a headache for Beijing



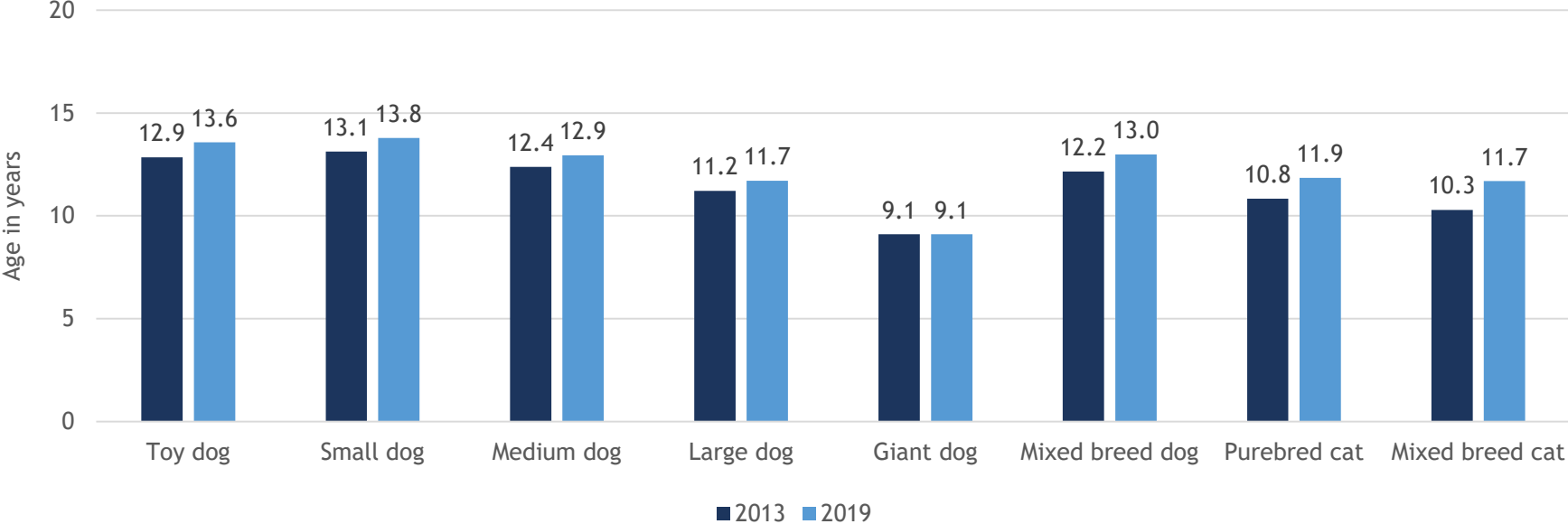
By Chris Lau, [Marc Stewart](#) and [Martha Zhou](#), CNN

6 minute read · Published 6:00 PM EDT, Thu September 12, 2024



Pets are living longer

US: life expectancy at birth of cats and dogs, by type, 2013-19



Source: Frontiers

Gen Alpha will be a pet-loving generation with spending power

2010-24

when Gen Alphas were born

57%

of US parents with dogs/cats
got their pet as a companion
for their kids

\$5.5 trn

spending power by 2029

Younger consumers spend more on pets

69%

“Money concerns would make me spend less on my own food than food for my pet”



Gen Z
b. 1997 - 2012

Millennials
b. 1981 - 1996

57%



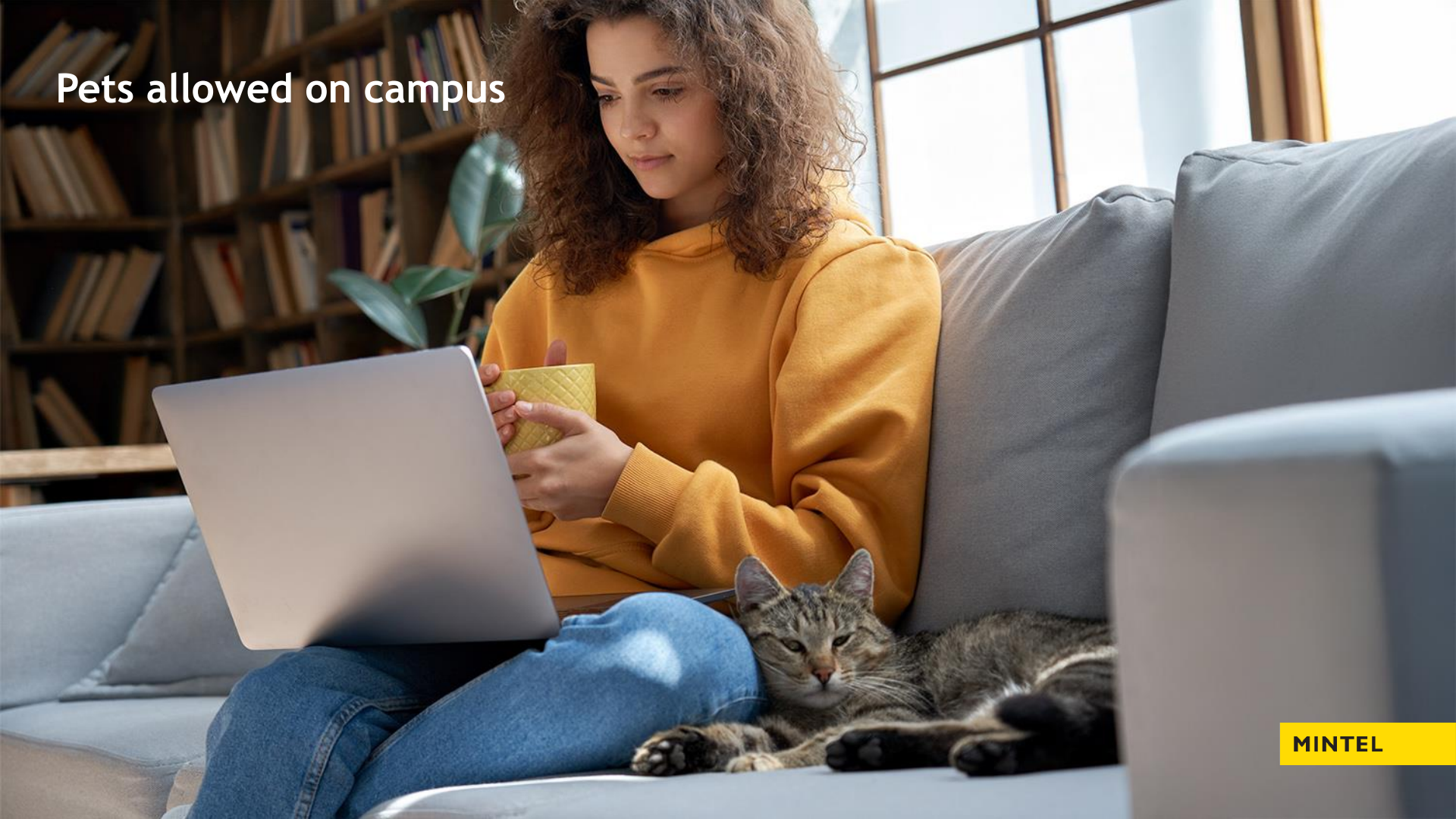
Gen X
b. 1965 - 1980

Baby Boomers
b. 1946 - 1964

*Base: UK: 1,038 internet users aged 16+ who buy food for their pets
Source: Kantar Profiles/Mintel, May 2021*

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Pets allowed on campus



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The wellbeing revolution

Gen Alpha will oscillate between fortified and clean label

Gen Alpha and wellness

33%

of global food and drink launches for children are vitamin/mineral fortified

doubled

Digestive health claims have more than doubled share of children's food and drink launches in the last ten years

65%

of German parents of 0-4s are put off feeding their children ready-made food because they fear it is too processed

Parents of Gen Alphas look for treats with functional health benefits

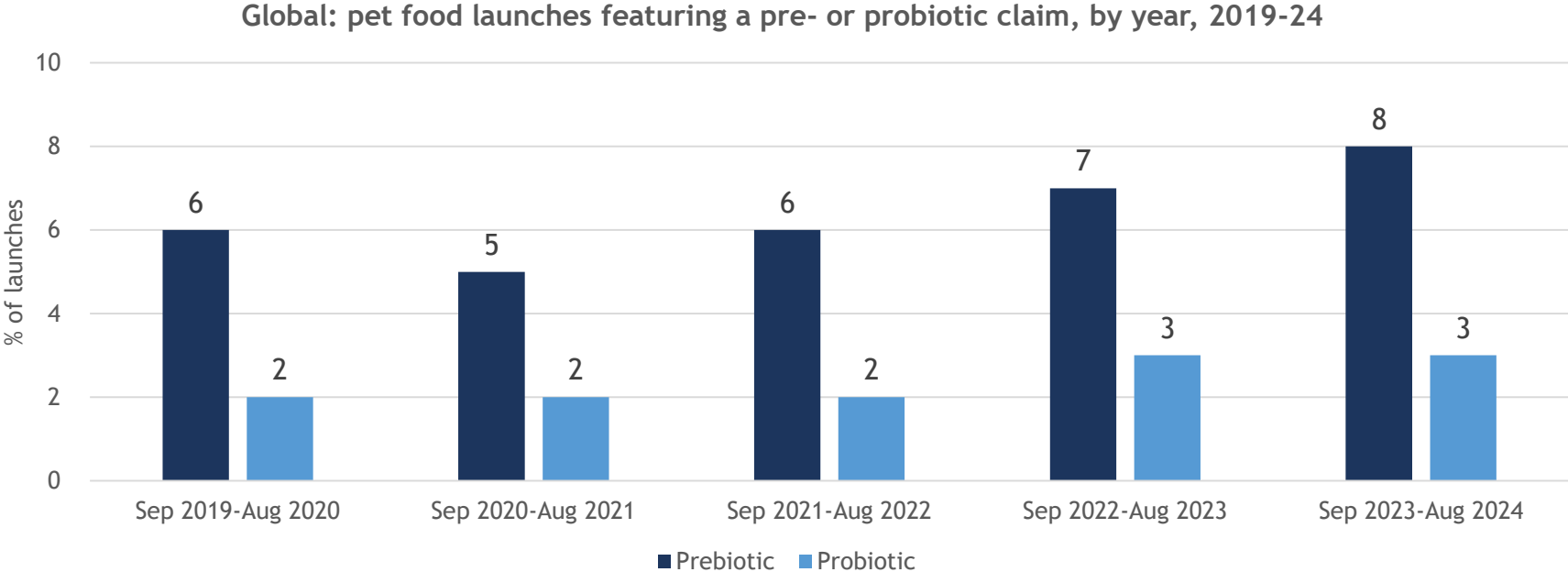
78%

of US pet food buyers with children aged 11 and under are interested in treats/toppers with functional health benefits, vs 69% on average

*Base: US; 1,509 internet users aged 18+ who purchase pet food/treats
Source: Kantar Profiles/Mintel, June 2023*

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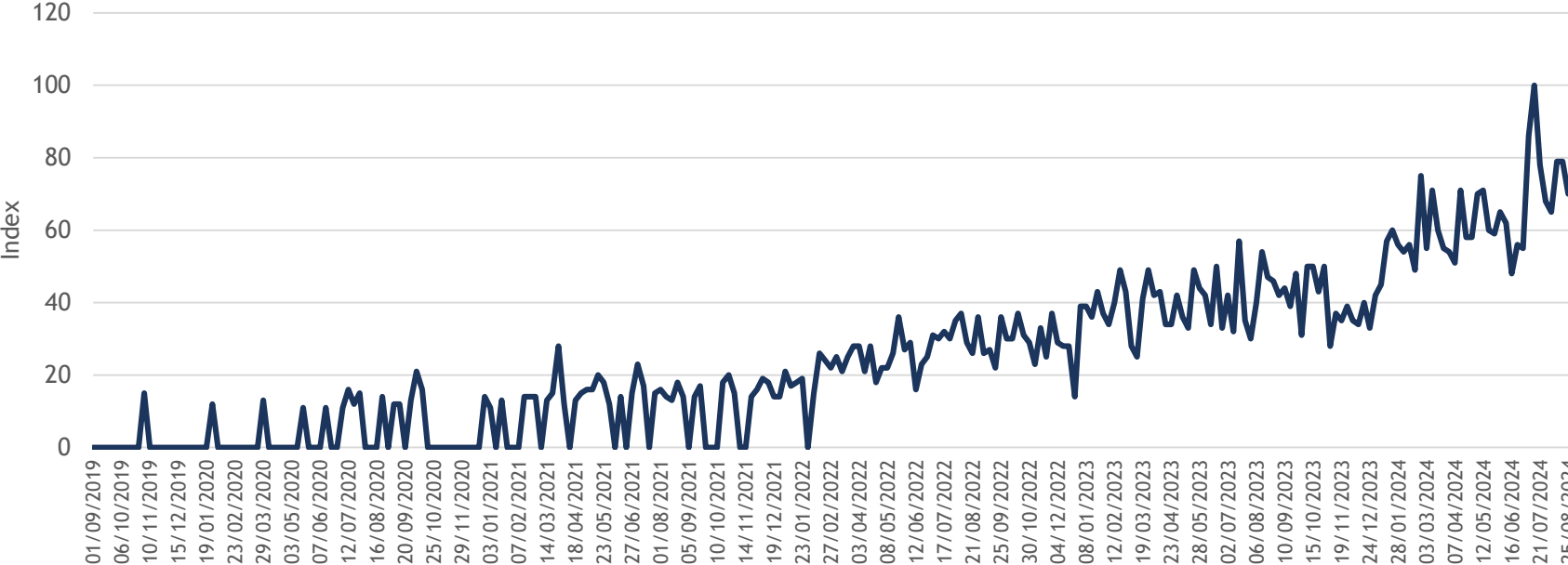
The increasing demand for digestive health benefits



Source: Mintel GNPD, September 2019-August 2024

Consumer interest in postbiotics is increasing

Global: search interest of "postbiotic", by month, 2019-24



Numbers represent search interest relative to the highest point on the chart for the given region and time; a value of 100 is the peak popularity for the term, a value of 50 means that the term is half as popular, a score of 0 means there was not enough data for this term

Source: Google Trends

Postbiotics in action



Halo Holistic Natural Food For Cats (Canada)



JAC Superfood Crumbles Cat Food Topper & Gravy Mix (Canada)

Parents of Gen Alphas give pets supplements

A close-up photograph of a person's hand holding a small, white and orange pill. A Corgi dog is looking up at the pill with interest. The background is a light-colored, textured surface.

39%

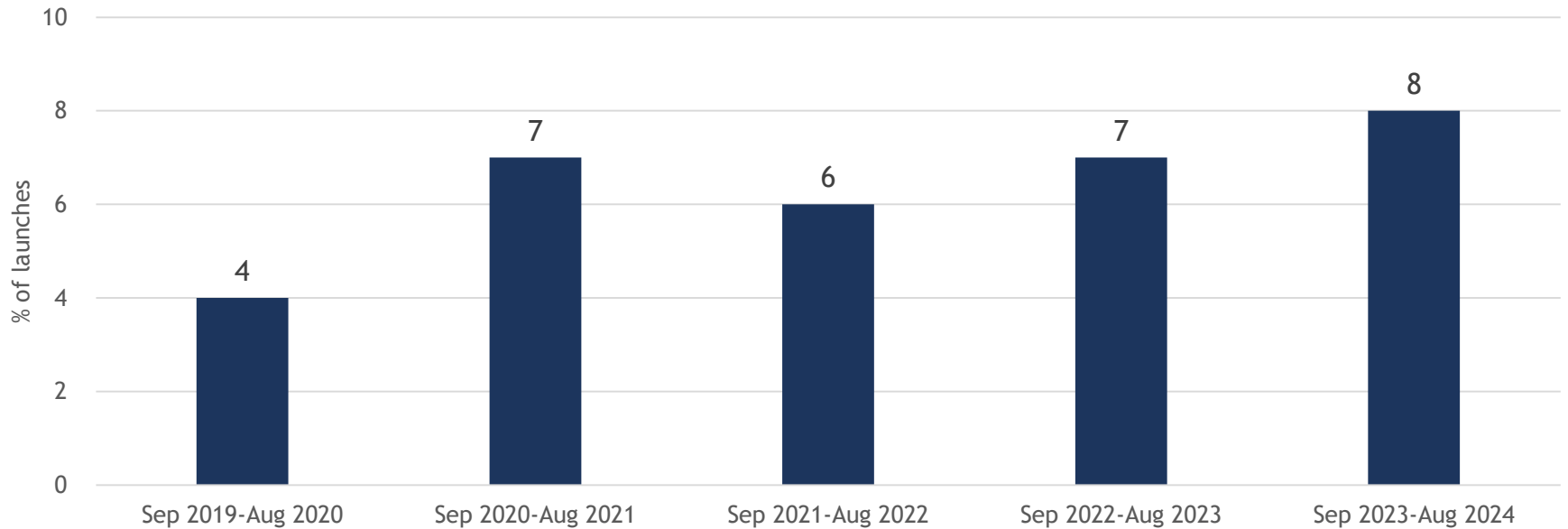
of UK pet owners with children aged 15 and under give their pets health supplements, vs an average of 32% of all pet owners

*Base: UK: 1,036 internet users aged 16+ who are pet owners
Source: Kantar Profiles/Mintel, May 2023*

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Supplements are on the rise

Global: supplement launches as share of pet products, by year, 2019-24

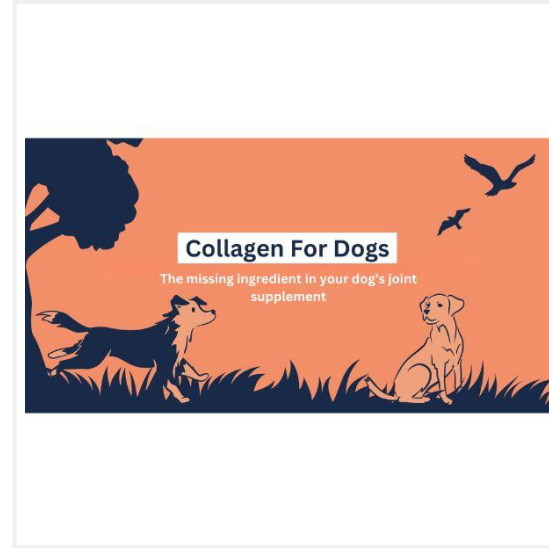


Source: Mintel GNPD, September 2019-August 2024

Collagen is featuring in supplements



Pawable Collar-Gen for healthier and happier dogs (UK)



The “missing ingredient”

Parents of Gen Alphas show more interest in fresh and raw food

60%

of US pet food buyers with children aged 11 and under are interested in refrigerated fresh pet food vs 44% of all US pet food buyers

57%

of UK pet owners with children aged 11 and under say the ideal diet for pets is as close as possible to what their ancestors would have eaten vs 48% of all UK pet owners

58%

of US pet food buyers with children aged 11 and under are interested in raw pet food versus 40% of all US pet food buyers

Formulate fresh or gently processed food



100% natural frozen food
Tamalitos Dog Chicken and Vegetable
Balanced Dog Food (Mexico)



Gently processed
Josera Kitten Super Premium Pet
Food (Germany)



Minimally processed 'clusters'
The Honest Kitchen Whole Grain
Beef & Oat Recipe (US)

Maintain freshness through portion packs



Nutro Supremo Jelly Dog Food for Puppies (Japan)



The climate conundrum

Gen Alpha will demand value over sustainability

Gen Alpha and sustainability

40%

of children's food and drink launches feature an ethical/environmental claim, up from 30% five years ago

17%

of UK parents* of 4-12s say their kids express concerns about climate change

** taken from Mintel's Global Consumer*

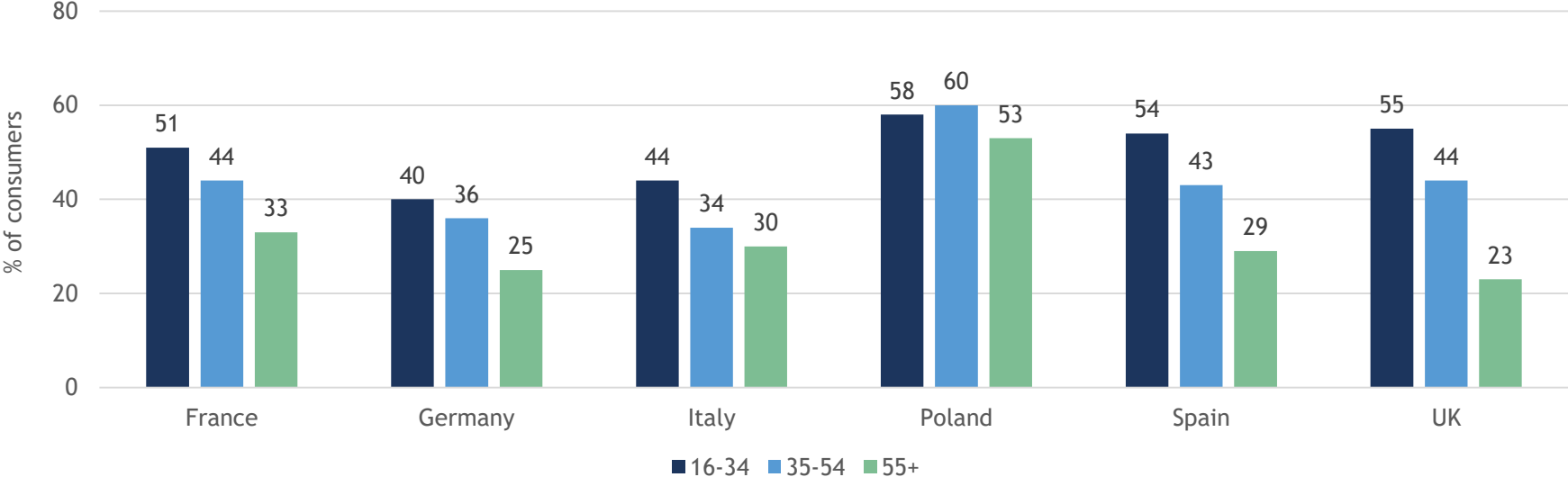
Base: UK: 281 internet users aged 16+ who are parents of children under 18

Source: Mintel GNPD, September 2019-August 2024; Kantar Profiles/Mintel, March 2024

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Young pet owners deprioritise sustainability due to money concerns

Selected markets: agreement that money concerns have made the sustainability of the food people feed their pet(s) less important to them, by age group, 2023



Base: internet users aged 16+ who are pet owners (France: 610; Germany: 1,042; Italy: 666; Poland: 710; Spain: 622; UK: 1,036)

Source: Kantar Profiles/Mintel, May 2023, August 2023

Insect pet food comes at a premium

44%

of UK pet owners say that pet food made from insect protein should be cheaper than food made from animal protein

32%

premium per 100ml/g: global treat launches containing insect protein vs the average of the total global treat category

Base: UK: 1,137 internet users aged 16+ who are pet owners

Source: Kantar Profiles/Mintel, May 2022; Mintel GNPD, September 2019-August 2024

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Private labels should venture into sustainable options

93% of global insect-based pet food launches are branded



Natur Insektplus Cat Food with Soldier Fly Larvae & Peas (Austria)

Climate change is threatening grain production

Just three of the 200,000+ edible plants in the world provide 40% of the world's food energy intake

ENERGY INTAKE

33%

of global pet food launches contain rice, corn or wheat

Go beyond the regular grains



Belcando Finest GF Lamb Complete Food for Mini Adult Dogs (Germany)

Reich an
Amaranth
Wertvolle Alternative
zu Getreide
Rich in amaranth
Valuable alternative
to grain

Help pets endure extreme weather



LIMIT THE IMPACT

46%

of Polish pet owners say the pet food that pet owners buy has a big impact on their environmental footprint

Base: Poland: 710 internet users aged 16+ who are pet owners

Source: Kantar Profiles/Mintel, August 2023

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Weatherproofed pet food provisions



Strengthen resistance to heat exhaustion
Pet One Fresh and Healthy Puppy Food (Philippines)



Cool hotel for cats
Thanko Animal Capsule Hotel is equipped with a cooler and a heater (Japan)



Tick and flea protection
Bogaprotect Antiparasite Coconut Nuggets (Germany)

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Experts in what consumers want and why

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