

Report Price: £1095.00 | \$1453.83 | €1247.97

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Increasing humanisation of pets is seeing Irish owners willing to splash out more on their pets, with year-on-year growth of pet food spending. Three quarters of pet owners see their pets as members of their family, and as such are willing to spend more to cater to their needs."

- Brian O'Connor, Senior Consumer Analyst

## This report looks at the following areas:

- Weight issues becoming an issue for pets
- Pet food brands reducing unhealthy ingredients in food products
- RoI consumers' personal finances improve, mixed picture in NI
- Traceability and ingredient labelling very important to Irish pet owners

# BUY THIS REPORT NOW

**VISIT:** store.mintel.com

**CALL:**EMEA
+44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

**EMAIL:** reports@mintel.com

**DID YOU KNOW?** 

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1095.00 | \$1453.83 | €1247.97

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## **Table of Contents**

#### **Overview**

What you need to know

Products covered in this Report

#### **Executive Summary**

#### The market

Figure 1: Estimated value sales for all pet food, NI and RoI, 2012-17

#### Forecast

Figure 2: Indexed estimated value sales for all pet food, NI and RoI, 2012-22

#### Market factors

Ireland a nation of pet lovers

Weight issues becoming an issue for pets

Pet food brands reducing unhealthy ingredients in food products

RoI consumers' personal finances improve, mixed picture in NI

Companies, brands and innovations

The consumer

## Dry food sees strongest usage among pet owners

 $\label{eq:figure 3: Types of pet food that consumers typically buy for their cats and dogs, NI and RoI, November 2017 \\$ 

## Toys bought by half of Irish pet owners in 2017

Figure 4: Types of pet accessories that consumers have bought in the last 12 months, NI and RoI, November 2017

## NI pet owners more likely to have pet insurance than those in RoI

Figure 5: Types of pets that consumers currently have pet insurance for, NI and RoI, November 2017

Figure 6: Types of pet insurance that consumers currently have, NI and RoI, November 2017

## Traceability and ingredient labelling very important to Irish pet owners

Figure 7: Agreement with statements relating to pet food and pet accessories, NI and RoI, September 2017

Figure 8: Agreement with statements relating to pets, NI and RoI, September 2017

Figure 9: Agreement with statements relating to pet insurance, NI and RoI, September 2017

## What we think

## The Market - What You Need to Know

Pet foods a growing market

Dogs are the most popular type of pet

Obesity becoming an issue for pets

Personal finances improve for RoI consumers

## **Market Size and Forecast**

## Value of pet food sales increases year on year

Figure 10: Estimated value sales for pet food (cat and dog food only), IoI, NI and RoI, 2012-22

Dog food sales more valuable than cat food sales

BUY THIS REPORT NOW

VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £1095.00 | \$1453.83 | €1247.97

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Estimated value sales for cat food and dog food, IoI, 2015-17

#### **Market Drivers**

#### Over six in 10 own at least one pet

Figure 12: Types of pets that consumers currently have in their household, NI and RoI, November 2017

#### Women more likely to own a cat or dog

Figure 13: Ownership of cats and/or dogs, by gender, NI and RoI, November 2017

Figure 14: Actual and projected population (%) for RoI and NI, by age, 2011 and 2026

## Increased consumer prices in NI could see spending on pets re-evaluated

Figure 15: Consumer price index, all items, UK/NI, January 2015-October 2017

Figure 16: Consumer price index, all items, RoI, January 2015-October 2017

#### NI consumers more likely to feel 'worse off'

Figure 17: How consumers currently rate their financial situation, NI and RoI, August 2016 and August 2017

Figure 18: How consumers describe their finances compared to a year ago, NI and RoI, September 2017

## Growing importance of discounters to pet market

Figure 19: Consumers who have visited food vs non-food discounters once per week, NI and RoI, February 2016

Figure 20: What effect consumers think Brexit will have on the economy, NI and RoI, September 2017

#### Animal shelters seeing increased admissions

## Pet food bank established in Scotland

Figure 21: Selected types of charities that consumers have donated to in the last 12 months, NI and RoI, June 2015

## Obesity a growing issue for Irish pets

## Pet food companies taking on the fat cats (and dogs)

Figure 22: Top five sub-categories of pet food launched, by those claiming to be L/N/R calorie or L/N/R fat, UK and Ireland, 2013-17

## Companies and Brands - What You Need to Know

Pet food prices increase at highest rate in three years in March

Pets at Home and Petstop basing growth on enhanced store portfolio with low prices

Nestlé Purina Pets at Work Initiative designed to help other companies become pet-friendly

## Who's Innovating?

## $\label{eq:continuous} \mbox{Dog snacks and treats launches dominate new product launches in booming market}$

Figure 23: New product launches in pet food market, by category, UK and Ireland, 2013-17

## Mars and Nestlé Purina lead the way in new products launched

Figure 24: Top 10 companies launching new pet food products, UK and Ireland, 2013-17

## Tesco and Asda following suit by launching pet food without preservatives

Figure 25: Claims category of new products launched in pet food market, UK and Ireland, 2013-17

## **Companies and Brands**

Maxi Zoo (RoI Only)

Key facts

Product portfolio

Recent developments

BUY THIS REPORT NOW

VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

**EMAIL:** reports@mintel.com



Report Price: £1095.00 | \$1453.83 | €1247.97

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Petstop (RoI Only)

Key facts

Product portfolio

Recent developments

Petmania (RoI Only)

Key facts

Product portfolio

Recent developments

Jollyes (NI Only)

Key facts

Product portfolio

Gary's Pet World

Key facts

Product portfolio

Pets at Home (NI only)

Key facts

Product portfolio

**Brand NPD** 

Recent developments

The Pet Hut

Key facts

Product portfolio

Tesco

Key facts

Product portfolio

Brand NPD

Recent developments

Asda (NI Only)

Key facts

Product portfolio

**Brand NPD** 

Mars Ireland

Key facts

Product portfolio

**Brand NPD** 

Nestlé Purina PetCare (Ireland)

Key facts

Product portfolio

Brand NPD



**VISIT:** store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £1095.00 | \$1453.83 | €1247.97

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

#### Recent Developments

#### The Consumer - What You Need to Know

Consumers show strong preference for dry pet food

Toys the preferred pet accessory

Most consumers do not have insurance for their pets

Traceability important to Irish pet owners

#### **Types of Pet Food Consumers**

## Dry food most used type of food for cats and dogs

Figure 26: Types of pet food that consumers typically buy for their cats and dogs, NI and RoI, November 2017

#### Dry food usage high among all demographic types

Figure 27: Consumers who buy dry cat and/or dog food for their pets, by social class, NI and RoI, November 2017

#### 'Humanisation' of pets helping to drive usage of snacks and treats

Figure 28: Consumers who buy snacks/treats for their pets, NI and RoI, November 2017

## **Purchasing of Pet Accessories**

#### Half of pet owners have bought toys for their pets

Figure 29: Types of pet accessories that consumers have bought in the last 12 months, NI and RoI, November 2017

## Toys less likely to be bought by mature pet owners

Figure 30: Consumers who have bought pet toys in the last 12 months, by gender and age, NI and RoI, November 2017

## A third have bought grooming equipment

Figure 31: Consumers who have bought pet grooming accessories in the last 12 months, by gender, NI and RoI, November 2017

## Buying Christmas presents for pets more popular with women

Figure 32: Consumers who have bought Christmas stockings for their pets in the last 12 months, by gender, NI and RoI, November

2017

Figure 33: Christmas-themed pet food and pet accessories launched, UK and Ireland, 2013-17\*

## **Ownership of Pet Insurance**

## Seven in 10 RoI pet owners don't have insurance

Figure 34: Types of pets that consumers currently have pet insurance for, NI and RoI, November 2017

Figure 35: Consumers who currently own dog insurance, by gender, NI and RoI, November 2017

## NI owners opt for mid- to high-level cover, RoI opt for basic

Figure 36: Types of pet insurance that consumers currently have, NI and RoI, November 2017

Figure 37: Pet owners who currently have high-level pet insurance cover, by social class, NI and RoI, November 2017

## **Attitudes towards Pets**

## Consumers want traceability in pet food

Figure 38: Agreement with statements relating to pet food and pet accessories, NI and RoI, September 2017

## Traceability important across all demographics

## Two thirds check pet food labels - pointing to interest in clean labelling

Figure 39: Agreement with the statement 'It is important to check labels closely to ensure there are no hidden ingredients', by gender, NI and RoI, September 2017

## Pet owners willing to embrace apps to improve pet health

Figure 40: Agreement with the statement 'I would be interested in buying pet accessories that can be controlled by an app (eg feeder/monitor)', by daily internet usage, NI and RoI, September 2017

BUY THIS
REPORT NOW

VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

**EMAIL:** reports@mintel.com



Report Price: £1095.00 | \$1453.83 | €1247.97

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Pets seen to improve quality of life and treated as family members

Figure 41: Agreement with statements relating to pets, NI and RoI, September 2017

NI consumers more likely feel it is important to have all pets insured

Figure 42: Agreement with statements relating to pet insurance, NI and RoI, September 2017

Appendix - Data Sources, Abbreviations and Supporting Information

Consumer research

Data sources

Market size rationale

Abbreviations

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com