## Pets - Ireland - December 2017


"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)2076064533

Brazil 08000959094

Americas
$+1(312) 9435250$

China
+86 (21) 60327300

APAC
+61 (0) 282848100
EMAIL: reports@mintel.com

## Pets - Ireland - December 2017

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
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

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?

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

## Pets - Ireland - December 2017

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

## Pets - Ireland - December 2017

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

## Pets - Ireland - December 2017

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

