

Pet Food - UK - August 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“The desire to pamper pets has underpinned the continuous value sales growth in the market, with NPD often reflecting trends in the human food market. This bodes well for emerging pet food types such as high protein and plant-based. However, proving their worth, particularly in terms of their health credentials, looks to be needed.”

– **Alyson Parkes, Research Analyst**

This report looks at the following areas:

- Grain-free and plant-based pet food spark interest but lack awareness
- Trust in functional claims on pet food is still low
- Opportunity for subscription services in pet food

Total value sales of cat and dog food grew over 2013-18. The ongoing premiumisation of pet food has pushed up average prices above inflation, which is expected to continue to prop up value sales going forward. With little growth expected in the UK's pet population, volume sales are predicted to grow by a modest amount over the next five years to 2023.

The humanisation of pet food continues to be a core driver behind NPD (New Product Development), particularly in the snacks and treats segment, however, these products have been identified as one of the culprits in the high obesity rates among UK cats and dogs. This could pose a problem to the segment if owners are encouraged to cut back to support weight management. Meanwhile, the overarching humanisation trend should support the interest in emerging types of pet food such as high-protein, grain-free and plant-based.

**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

DID YOU KNOW?

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

Pet Food - UK - August 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Strong growth in value sales continues in 2018

Figure 1: Total UK retail value sales of cat and dog food, 2013-23

Modest volume growth predicted over 2018-23

Snacks and treats see strong value and volume growth in dog food

Figure 2: UK retail value sales of dog food, by type, 2016-18

Wet cat food retains share of value and volume sales

Figure 3: UK retail value sales of cat food, by type, 2016-18

Pet ownership is stable, pressures remain

Pet obesity remains top welfare concern for vets

Focus on plastic packaging is a challenge for the market

Companies and brands

Leading dog food brands continue to see sales fall

Figure 4: Leading brands' sales in the UK retail wet and dry dog food market, by value, 2016/17 and 2017/18

Felix and Whiskas see another year of falling sales

Figure 5: Leading brands' sales in the UK retail wet and dry cat food market, by value, 2016/17 and 2017/18

Mars and Nestlé lead launches; NPDI focuses on texture

Sainsbury's launches hypoallergenic pet food; Tesco extends availability of chilled food

Upswing in pet food tapping into buzz around gut health

Advertising spend enters third year of decline

Cat food claws back some share of adspend

The consumer

Dry food leads for dogs, wet for cats

Figure 6: Feeding cats and dogs shop-bought and homemade food, May 2018

High reported purchasing of high-protein pet food, plant-based lags

Figure 7: Interest in buying selected emerging types of pet food, May 2018

High-protein pet food enjoys nutritious image, grain-free and plant-based lack awareness

A favourite brand is important to two fifths of pet owners

Figure 8: Choice factors when purchasing pet food, May 2018

Products that allow pets to join in human activities garner interest

Figure 9: Interest in pet food products, May 2018

Need to tackle scepticism about pet food health claims

Figure 10: Behaviours related to pet food, May 2018

**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

Pet Food - UK - August 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

What we think

Issues and Insights

Grain-free and plant-based pet food spark interest but lack awareness

The facts

The implications

Trust in functional claims on pet food is still low

The facts

The implications

Opportunity for subscription services in pet food

The facts

The implications

The Market – What You Need to Know

Strong growth in value sales continues in 2018

Modest volume growth predicted over 2018-23

Snacks and treats see strong value and volume growth in dog food

Wet cat food retains share of value and volume sales

Pet ownership is stable, pressures remain

Pet obesity remains top welfare concern for vets

Focus on plastic packaging is a challenge for the market

Market Size and Forecast

Strong growth in value sales continues

Figure 11: Total UK retail value and volume sales of cat and dog food, 2013-23

Marginal growth expected for volume sales

Figure 12: Total UK retail volume sales of cat and dog food, 2013-23

Strong outlook for value sales forecast

Figure 13: Total UK retail value sales of cat and dog food, 2013-23

Forecast methodology

Market Segmentation

Snacks and treats see strong value and volume growth in dog food

Figure 14: UK retail value and volume sales of dog food, by type, 2016-18

Wet dog food value sales grow ahead of volumes

Wet cat food retains share of value and volume sales

Figure 15: UK retail value and volume sales of cat food, by type, 2016-18

Market Drivers

Pet obesity remains top welfare concern for vets

Pet ownership is stable

Figure 16: Pet ownership, by type of pet, May 2014-May 2018

Private renting curbs pet ownership

**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

Pet Food - UK - August 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 17: Cat and dog ownership, by housing situation, May 2017

Growing child population should support the market

Figure 18: Cat and dog ownership, by presence of children in the household, May 2018

Return to growth for real incomes

Figure 19: Annual percentage change in CPI and AWE (regular pay), monthly basis, January 2012-May 2018

Focus on plastic packaging is a challenge for the market

Figure 20: Share of new products in the UK pet food market carrying an environmentally friendly package claim, 2014-18

Raw food faces safety concerns

Companies and Brands – What You Need to Know

Leading dog food brands continue to see sales fall

Felix and Whiskas see another year of falling sales

Mars and Nestlé lead launches; NPD focuses on texture

Sainsbury's launches hypoallergenic pet food; Tesco extends availability of chilled food

Upswing in pet food tapping into buzz around gut health

Advertising spend enters third year of decline

Cat food claws back some share of adspend

Market Share

Leading dog food brands continue to see sales fall

Figure 21: Leading brands' sales in the UK retail wet and dry dog food market, by value and volume, 2016/17 and 2017/18

Own-label continues to gain share

Good Boy and Pedigree prop up volume growth for dog snacks and treats

Figure 22: Leading brands' sales in the UK retail dog snacks and treats market, by value and volume, 2016/17 and 2017/18

Felix and Whiskas see another year of falling sales

Strong value sales continue for Gourmet and Sheba

Figure 23: Leading brands' sales in the UK retail wet and dry cat food market, by value and volume, 2016/17 and 2017/18

Dreamies' sales fall into decline; Whiskas' woes continue

Figure 24: Leading brands' sales in the UK retail cat snacks and treats market, by value and volume, 2016/17 and 2017/18

Launch Activity and Innovation

Dog snacks and treats extend share of launches

Figure 25: New product launches in the UK pet food market, by segment (sorted by 2017), 2014-18

Mars and Nestlé lead launches; NPD focuses on texture

Figure 26: Share of new product launches in the UK pet food market, by company, 2014-18

Butcher's Pet Care revamps dog food range

Figure 27: Butcher's Nourishing Food for Dogs, April 2018

Dreamies extends portfolio with Deli-Catz range

Figure 28: Dreamies' new Deli-Catz range of cat treats, August 2017

Raft of launches from premium cat food brand Sheba

Figure 29: Sheba Creamy Snacks with Beef, January 2018

**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

Pet Food - UK - August 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Nestlé extends Purina Gourmet range...

Figure 30: Purina Gourmet Melting Heart Cat Food, January 2018

...and adds premium Concoctions range to Felix As Good As It Looks

Figure 31: Felix As Good As It Looks Concoctions wet cat food, March 2018

Lily's Kitchen launches 'Suppurrs Stews'

Figure 32: Lily's Kitchen Suppurrs Stews, July 2018

Sainsbury's launches a range of hypoallergenic pet food

Figure 33: Sainsbury's hypoallergenic pet food, January 2018

Tesco extends availability of chilled pet food in its stores

Figure 34: Examples of chilled dog food products available at Tesco, December 2017-February 2018

M&S' NPD activity focuses on range rebrand

Figure 35: Examples from M&S pet food range, January-June 2018

No additives/preservatives claims surge forward

Figure 36: Share of new product launches in the UK pet food market carrying a no additives/preservatives claim, 2014-18

Upswing in pet food tapping into buzz around gut health

Figure 37: Fish4Dogs pet food with prebiotics, April 2018

Novelty pet food launches on the up

Three Dog Bakery launches Sandwich Cookies for dogs

Figure 38: Sandwich cookies from Three Dog Bakery, March 2018

"Alcohol-style" drinks for pets are emerging

Figure 39: 'Pawsecco' products, 2017 and 2018

Austin and Kat brings CBD dog biscuits to the UK

Packaging activity spans sustainability and social causes

Webbox makes 100% recyclable packaging pledge

Naturediet Pet Foods plans transition to Tetra Pak cartons

Lily's Kitchen repackaged to celebrate Pride

Advertising and Marketing Activity

Advertising spend enters third year of decline

Figure 40: Total above-the-line, online display and direct mail advertising expenditure on pet food, 2014-18

Cat food claws back some share of adspend

Figure 41: Total and share of above-the-line, online display and direct mail advertising expenditure on pet food, by type, 2014-18

Whiskas is the most heavily advertised brand despite cutbacks

Figure 42: Total above-the-line, online display and direct mail advertising expenditure on pet food, by top 10 brands, 2014-18

Dreamies promotes new Deli-Catz range of treats

Felix is still #uptomischief

Sheba continues with Resistance is Futile campaign

Pets at Home partners with Jimmy Doherty to ask "What's in your dog's dinner?"

James Wellbeloved partners with The Times for #wellchuffed campaign

Harringtons introduces Walkies on the Wild Side campaign

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

Pet Food - UK - August 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Lily's Kitchen launches first above-the-line campaign...
...and leads the call for companies to 'ditch the pouch'
Nielsen Ad Intel coverage

The Consumer – What You Need to Know

Dry food leads for dogs, wet for cats
High reported purchasing of high-protein pet food, plant-based lags
High-protein pet food enjoys nutritious image, grain-free and plant-based lack awareness
A favourite brand is important to two fifths of pet owners
Products that allow pets to join in human activities garner interest
Need to tackle scepticism on pet food health claims

Pet Food Feeding Behaviours

Dog owners are more likely to make pet food at home than cat owners
Figure 43: Feeding cats and dogs shop-bought and homemade food, May 2018
Dry food remains the staple for dogs, wet food for cats
Figure 44: Types of pet food bought, by type of pet, May 2018

Interest in Purchasing Emerging Types of Pet Food

High-protein pet food is reportedly bought by more than a third
Figure 45: Interest in buying selected emerging types of pet food, May 2018
Just three in 10 pet owners are interested in buying raw food
Figure 46: Share of new product launches in the UK pet food market carrying selected claims, 2014-18
Younger pet owners are the most interested in buying grain-free pet food
Sizeable interest in plant-based pet food
Uptick in NPD fuelled by snacks
Figure 47: Examples of vegan/vegetarian dog treats in the UK pet food market, May 2018

Qualities Associated with Emerging Types of Pet Food

High-protein food is associated with the most positive attributes
Figure 48: Correspondence analysis, perceptions of selected pet food concepts, May 2018
Figure 49: Perceptions of selected pet food concepts, May 2018
Widespread uncertainty about grain-free and plant-based pet foods
Only 19% see plant-based as better for the environment
Grain-free and plant-based foods lag behind on perceptions as nutritious
Raw food is seen as the least processed but storage is a concern

Choice Factors in Pet Food Purchasing

A favourite brand is important to two fifths of pet owners
Figure 50: Choice factors when purchasing pet food, May 2018
Functional benefits are important yet scepticism is high
All-natural ingredients are less of a priority than price
Figure 51: Share of new product launches in the UK pet food market carrying an all-natural product claim, 2014-18

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

Pet Food - UK - August 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Older pet owners are most likely to look for foods specific to lifestage

Interest in Pet Food Products

Products that allow pets to join in human activities garner most interest

A quarter would be interested in buying pet-friendly cakes for special occasions

Figure 52: Interest in pet food products, May 2018

Pet-friendly drinks is an under-explored area of the pet market

Frozen treats can help with fluid intake

Behaviours Related to Pet Food

Proving health claims on pet food is important

A role for vets and store staff in building trust

Figure 53: Behaviours related to pet food, May 2018

Campaigns on the quality of pet food have reached a sizeable audience

Figure 54: Example of grain-free dog food highlighting ingredients, April 2018

Marked interest in subscription pet food plans

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Market Size and Forecast

Figure 55: Best- and worst-case forecasts for retail sales of cat and dog food, by value, 2018-23

Figure 56: Best- and worst-case forecasts for retail sales of cat and dog food, by volume, 2018-23

Forecast methodology

Appendix – Market Drivers

Figure 57: Trends in the age structure of the UK population, 2013-18 and 2018-23

Appendix – Launch Activity and Innovation

Figure 58: New product launches in the UK pet food market, by branded versus own-label, 2014-18

Figure 59: Share of new product launches in the UK pet food market carrying a digestion and urinary tract claim, 2014-18

Figure 60: Share of new product launches in the UK pet food market carrying a seasonal claim, 2014-18

Appendix – Advertising and Marketing Activity

Figure 61: Share of above-the-line, online display and direct mail advertising expenditure on pet food, by top 10 brands, 2014-18

Figure 62: Total above-the-line, online display and direct mail advertising expenditure on pet food, by top 10 advertisers, 2014-18

Figure 63: Share of above-the-line, online display and direct mail advertising expenditure on pet food, by top 10 advertisers, 2014-18

Figure 64: Total and share of above-the-line, online display and direct mail advertising, by media type, 2014-18

Appendix – Market Share

Figure 65: Leading manufacturers' sales in the UK retail wet and dry dog food market, by value and volume, 2016/17 and 2017/18

Figure 66: Leading manufacturers' sales in the UK retail dog snacks and treats market, by value and volume, 2016/17 and 2017/18

Figure 67: Leading manufacturers' sales in the UK retail wet and dry cat food market, by value and volume, 2016/17 and 2017/18

Figure 68: Leading manufacturers' sales in the UK retail cat snacks and treats market, by value and volume, 2016/17 and 2017/18

**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

Pet Food - UK - August 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Appendix – The Consumer

Figure 69: How pet food is typically bought, May 2018

Figure 70: Repertoire of types of pet food bought, May 2018

**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