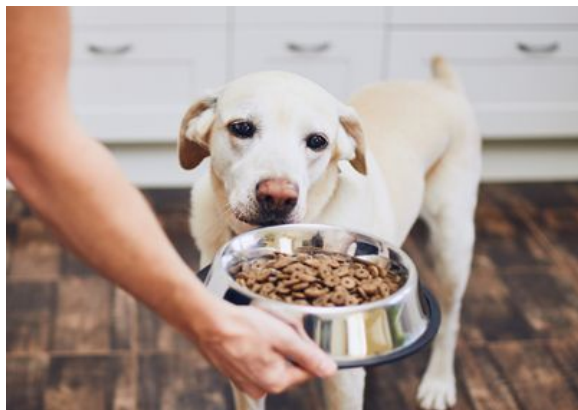


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“The recession triggered by COVID-19 is prompting consumers to scrutinise their spending. The extensive private label presence on the one hand and the myriad of small specialist brands on the other leave mainstream brands faced with a formidable task to prove their value.”
 – Angharad Goode, Research Analyst

This report looks at the following areas:

- The impact of COVID-19 on the pet food market
- Product launch activity trends and opportunities for 2020
- Pet food feeding and buying behaviour
- The heightened focus on health and wellbeing of pets and key benefits owners look for

30% of dog/cat food buyers express interest in pet food made from lab-grown meat. This links to the wider interest in sustainable ingredients in pet food, an extension of people showing more consideration for their own diets' impact on the environment.

While COVID-19 prompted stockpiling of pet food, snacks and treats were the only segment to enjoy a lasting uplift in sales. Longer term, however, the outbreak is expected to bring about more working from home, which could facilitate higher pet ownership, boosting the demand for pet food.

The economic downturn triggered by COVID-19 stands to prompt consumers to trade down in pet food, with 46% of dog/cat food buyers saying this is a good way of saving money. The extensive private label offering that has developed since the last recession offers vast opportunities for such economising. Financial hardship or uncertainty could also see people delay acquiring pets, curbing the growth of the pet population.

Products that support pet health offer a lot of potential in the market. Heart health, digestive health and supporting the immune system are dog/cat food buyers' key areas of interest. With each of these claims appearing only on a minority of launches, there is marked further potential in these areas, while these claims also warrant more focus in communication.

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