

Pet Food - China - 2022

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This report looks at the following areas:

- What marketing activities and new product trends are worth attention in the future?
- How is the feeding frequency of pet food sub-categories evolving?
- What are the leading factors when repurchasing pet foods?
- What is the most preferred mixed-meat combination?
- What do pet owners think of weight management via diet?

Besides feeding their pets normal staple foods, jerky/sausage shows the smallest gap (6 percentage points) between pet owners with low and high household incomes, underlining its high penetration across different income levels. Interestingly, when it comes to "once a day or more", jerky/sausage is the category with the biggest difference between low and high household income pet owners. Therefore, jerky/sausage not only has high acceptance among pet owners at different income levels, which makes it easier to attract new consumers, but also has more heavy users among high household income pet owners, which gives it a higher chance of harnessing premiumisation.

The numbers of dog owners and urban dogs in 2021 have rebounded from 2020, driving the market together with the stable cat economy. However, COVID is still an uncertain trigger in pet owners' lives. News of how pets (especially dogs) were treated badly during the outbreaks in 2021 will be a continuing worry for those who want to own a dog. Meanwhile, the imports of raw ingredients also largely depend on the COVID policy in main port cities. Therefore, in the short term, market demand will depend more on the cat economy and the supply side will be influenced by the price of imported raw ingredients.

Tier 2 cities are where players should pay more attention to as the frequency of feeding "once a day or more" there is the lowest in many pet food sub-categories, especially in staple food such as normal staple food (66% vs 70%



"Naturalness is one of the leading repurchasing factors but with a specific definition. Pet owners ask not only for all-natural ingredients but also that the food should be part of the animal's natural diet. Together with food for weight management, these are the most urgent needs for the market to respond to."
 – Pepper Peng, Research Analyst

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total), wet food bags (14% vs 16% total) and canned wet foods (7% vs 9% total). Consumption habits of pet owners in tier 2 cities still has room for cultivation.

Opportunities for pet food lie in the needs of gut-healthy food with probiotics, natural food and food for weight management. Digestion is the leading claim in new launches. Riding the popularity of probiotics in human food, digestion claim can be upgraded and more easily accepted. Pet owners now like to feed their animals with what conforms to pets' natural diet and in the manner of how they're supposed to eat it. Weight management after sterilisation is something attracting increasing awareness in the global market. However, the Chinese market lags far behind in terms of natural and weight management claims.

What's included

- Executive Summary
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Table of Contents

OVERVIEW

- **What you need to know**
- **Key issues covered in this report**
- **Covered in this report**
- **Excluded**

EXECUTIVE SUMMARY

- **The market**
Figure 1: Total retail value sales and forecast of dog and cat food, China, 2017-2027
- **Companies and brands**
Figure 2: Leading companies in dog and cat food market, by value share*, China, 2020-2021
- **The consumer**
- **Normal staple food dominates and probiotics grow fast**
Figure 3: Consumption frequency, 2022
- **Professionalism and naturalness go first**
Figure 4: Repurchasing factors, 2022
- **Enough intake of water and protein but not fibre and acidic supplements**
Figure 5: Knowledge and intake of nutrients, 2022
- **Chicken and beef are most preferred meats**
Figure 6: Meat mix preference, 2022
- **Canned raw flesh and bones are the most wanted**
Figure 7: Interests in novel pet food
- **Wider awareness of weight management in pets creates potential for pet food innovation**
Figure 8: Attitudes towards weight management, 2022
- **What we think**

ISSUES AND INSIGHTS

- **Emphasise probiotics to upgrade digestive function**
- **The facts**
- **The implications**
Figure 9: Examples of pet food with probiotics
- **Pay more attention to pet food for weight management**
- **The facts**
- **The implications**
Figure 10: Examples of pet food with the low-calorie claim
Figure 11: KingJerry explains that overweight doesn't equate to cuteness on the introduction page for its pet food for weight management

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- Full Report PDF
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Figure 12: Adult Cat Food with Selected Chicken and Wholegrains, France, 2022

- **Dial up palatability via toppers**
- **The facts**
- **The implications**

Figure 13: Examples of pet food toppers

MARKET SIZE AND FORECAST

- **Market growth is driven by rebounding dog economy and steady cat economy**

Figure 14: Total retail value sales and forecast of dog and cat food, China, 2017-2027

Figure 15: Total retail volume sales and forecast of dog and cat food, China, 2017-2027

- **Strong momentum is going to continue in the next five years**

MARKET FACTORS

- **Significant increase in raw material prices**
- **Selected imported products are blocked due to avian flu**
- **Fiercer competition along with more financing**
- **JD launches promotion standard for staple food**

MARKET SEGMENTATION

- **Cat foods keep expanding**

Figure 16: Dog and cat food retail value market share, by segment, China, 2019-2021

Figure 17: New launches in the cat food segment, by subcategory, China, 2019-2022 (Jan – Jul)

MARKET SHARE

- **Gambol maintains steady growth**

Figure 18: Leading companies in dog and cat food market, by value share*, China, 2020-2021

- **The strong rise of domestic brands**
- **Yili taps into pet food**

MARKETING ACTIVITIES

- **Pro Plan from Nestlé in co-operation with Keep**

Figure 19: Pro plan x Keep fitness classes

Figure 20: Pro Plan x Keep pet food gift box

- **DC's Pet Gastroenterology R&D Centre**

Figure 21: DC's new strategy: focusing on pets' gut health

Figure 22: DC's Pet Gastroenterology R&D Centre

- **Zeal rolls out pet bowls with designer FX Balléry**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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Figure 23: Zeal x FX Balléry under the concept of “zero compromise”

NEW PRODUCT TRENDS

- Digestion ranks top in functional claims ...**
 Figure 24: Top 10 claim categories in pet food, China, 2019 (July) – 2022 (June)
 Figure 25: Top 15 claims in pet food, China, 2019 (July) – 2022 (June)
- ... and probiotic claim is growing fast**
 Figure 26: Probiotic claim in pet food, China, 2019 (July) – 2022 (June)
 Figure 27: Probiotic claim in pet food, by sub-category, China, 2019 (July) – 2022 (June)
- Natural claim and weight management claim are far behind**
 Figure 28: Natural claims share in the top ten pet food market, 2019 (July) – 2022 (June)
 Figure 29: Natural claims in pet food, China, 2019 (July) – 2022 (June)
 Figure 30: Low/no/reduced calorie claim in pet food, by top 10 markets, 2019 (July) – 2022 (June)
 Figure 31: Examples of weight management pet food
- Flavour type should be more diverse**
 Figure 32: Top 10 flavour in pet food, China, 2019 (July) – 2022 (June)
 Figure 33: Top 10 flavour in pet food, US, 2019 (July) – 2022 (June)
 Figure 34: Examples of diverse flavours in pet food, USA, 2022

CONSUMPTION FREQUENCY

- A stable diet structure with growing penetration of probiotics**
 Figure 35: Consumption frequency, 2022
 Figure 36: Penetration in 2021 and 2022
 Figure 37: Numbers of types to feed – once a day or more, 2022
- Penetration difference across income levels and city tiers**
- Jerky/sausage is good business for both penetration and premiumisation**
 Figure 38: Difference in consumption frequency – have fed this in the last 3 months, between pet owners whose monthly

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook

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household income is RMB 2,4000 or above and RMB 9,999 or below

Figure 39: Consumption frequency – once a day or more*, by household income level, 2022

- **Wet food bags becomes one of the predominate staple foods across city tiers**

Figure 40: Difference in consumption frequency – have fed this in the last 3 months, between pet owners in tier 1 cities and tier 3 cities

Figure 41: Consumption frequency – once a day or more*, by city tiers, 2022

REPURCHASING FACTORS

- **Professionalism and naturalness are both towards the top**

Figure 42: Repurchasing factors, 2022

- **Repurchase priorities of cat and dog owners are converging**

Figure 43: Repurchasing factors*, by pet ownership, 2022

- **Expert cat owners are more demanding**

Figure 44: Repurchasing factors, by ownership and experience, 2022

NUTRIENTS INTAKE

- **Pet owners are confident about water and protein but not fibre and acidic supplements**

Figure 45: Knowledge and intake of nutrients, 2022

- **Dog owners know more about minerals while cat owners know more about probiotics**

Figure 46: Nutrients intake – I know the amount it needs*, by ownerships, 2022

Figure 47: Nutrients intake – I know the amount it needs but haven't fed enough*, by ownerships, 2022

MEAT MIX PREFERENCE

- **Classic choice: chicken and beef**

Figure 48: Meat mix preference, 2022

- **Aquaculture for cat owners, poultry and beef for dog owners**

Figure 49: Meat type preference, by pet ownership, 2022

- **The most preferred combination: chicken & animal offal**

Figure 50: Preference of mixed meat type*, 2022

Figure 51: Preference of mixed meat combination, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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INTEREST IN NOVEL PET FOOD

- Canned raw flesh and bones are the most wanted**
 Figure 52: Interests in novel pet food
 Figure 53: Interests in pet food, by generations, 2022
- Families with both dogs and cats embrace more novelty**
 Figure 54: Interest in novel pet food, by ownerships, 2022
- Experienced pet owners can be targeted**
 Figure 55: Interest in novel pet food, by petting experience, 2022

ATTITUDES TOWARDS WEIGHT MANAGEMENT

- Pet owners are highly aware of weight management ...**
 Figure 56: Attitudes towards weight management – perception of weight management, 2022
 Figure 57: Perception of weight management, by generations, 2022
- ... but prefer adjusted nutrients to lose weight**
 Figure 58: Attitudes towards weight management – overweight and diet, 2022
 Figure 59: Selected attitudes towards weight management, by way to lose weight, 2022
 Figure 60: Selected attitudes towards weight management, by way to lose weight, 2022
- Naturalness and safety are key words for pet food for after sterilisation**
 Figure 61: Attitudes towards weight management – sterilisation and weight management, 2022
 Figure 62: Difference of repurchase factors, between pet owners who know and don't know what to pay attention on in terms of diet after sterilisation, 2022

APPENDIX – MARKET SIZE AND FORECAST

Figure 63: Total retail value sales and forecast of dog and cat food, China, 2017-2027
 Figure 64: Total retail volume sales and forecast of dog and cat food, China, 2017-2027

APPENDIX – MARKET SEGMENTATION

Figure 65: Retail value sales of dog and cat food, by segment, China, 2019-2021

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- Methodology
- Abbreviations

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook

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