

Pets - Ireland - 2023

Report Price: £1495 | \$1995 | €1800

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

This report looks at the following areas:

- The impact the cost-of-living crisis is having on spending on pets and interactions with pets.
- How working at home has impacted on consumers' relationships with their pets.
- How attitudes towards pets' health and obesity have changed purchasing intentions.
- Sustainability of usage of pet foods and accessories.
- Usage and types of pet insurance among Irish pet owners.
- The continued evolution of pets into 'members of the family' and humanisation.

The war in Ukraine has taken its toll on Irish consumers' finances, leaving many struggling to make ends meet and in turn this has had an impact in relation to Irish pets, with approximately four in 10 owners noting switching to cheaper pet foods, while a quarter have scaled back or cancelled insurance. Moving forward a key challenge for the sector will be justifying prices and proving value for money.



"The cost-of-living crisis is taking its toll on the furry members of Irish families, with owners cutting back on costs and more pets in danger of being surrendered to shelters. The ongoing 'humanisation' of pets, however, will mean those with the finances to do so, continue to pamper and treat their pets."

– **Brian O'Connor, Senior Consumer Analyst**

Buy this report now

Visit store.mintel.com

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

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**
- **Key issues covered in this Report**
- **COVID-19: market context**
- **Issues covered in this Report**

EXECUTIVE SUMMARY

- **The five-year outlook for pets**
Figure 1: Category outlook, 2023-28
- **The market**
- **Inflation creates uplift in pet spending value**
Figure 2: Estimated value sales for pet food (cat and dog food only), Iol, NI and Rol, 2017-23
Figure 3: Estimated value sales for cat food and dog food, NI and Rol, 2017-22
Figure 4: Estimated value sales for pet food, by category, Iol, 2022
- **Half of Rol consumers have a dog**
Figure 5: Types of pets that consumers currently own, NI and Rol, 2022
- **Pet population increased in Rol**
Figure 6: Number of cats and dogs in Rol households, 2016-21
Figure 7: If consumers own a pet, NI and Rol, 2017-22
- **Pet owners more likely to stay at home**
Figure 8: Where consumers mainly work, by pet ownership, NI and Rol, 2022
- **Increased consumer prices squeezing pet spending**
Figure 9: Consumer Price Index for food and non-alcoholic beverages, 2018-23
- **Many consumers still report tight finances**
Figure 10: How consumers describe their current financial situation, Iol, 2022-23
- **Innovations**
- **The consumer**
- **Strong usage of pet toys**
Figure 11: Types of pet accessories that consumers have bought in the last 12 months, NI and Rol, 2022
- **Use of dry food most common for cat/dog owners**
Figure 12: Types of pet food that consumers typically buy for their cats and dogs, NI and Rol, 2022
- **NI owners more likely to insure**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £1495 | \$1995 | €1800

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

Figure 13: If consumers have pet insurance for any of their pets, NI and RoI, 2020 and 2022

Figure 14: Level of pet insurance cover, NI and RoI, 2022

- **Pets are family in the eyes of most Irish owners**

Figure 15: Agreement with statements relating to pets, NI and RoI, 2022

- **Pets viewed as expensive**

Figure 16: Agreement with statements relating to pets, NI and RoI, 2022

THE MARKET – WHAT YOU NEED TO KNOW

- **Inflation creates uplift in pet spending value**
- **Half of RoI consumers have a dog**
- **Pet population increased in RoI**
- **Pet owners more likely to stay at home**
- **Increased consumer prices squeezing pet spending**
- **Many consumers still report tight finances**

MARKET SIZE AND FORECAST

- **The market**

- **The five-year outlook for pets**

Figure 17: Category outlook, 2023–28

- **Pet food sales continue to grow, despite cost-of-living worries**

Figure 18: Estimated value sales for pet food (cat and dog food only), IoI, NI and RoI, 2017–27

Figure 19: How consumers have reacted to rising costs of living, IoI, 2022–23

- **Higher dog ownership makes it a more valuable segment**

Figure 20: Estimated value sales for cat food and dog food, NI and RoI, 2017–22

Figure 21: Estimated value sales for pet food, by category, IoI, 2022

MARKET DRIVERS

- **Half of RoI consumers have a dog**

Figure 22: Types of pets that consumers currently own, NI and RoI, 2022

- **Small uplift in ownership levels in RoI; decline in NI**

Figure 23: If consumers own a pet, NI and RoI, 2017–22

- **Number of cats and dogs in Ireland has increased**

Figure 24: Number of cats and dogs in RoI households, 2016–21

- **Pet owners more likely to stay at home**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £1495 | \$1995 | €1800

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

Figure 25: Where consumers mainly work, by pet ownership, NI and RoI, 2022

- **Cost of living increasing strongly, putting pressure on pet spending**

Figure 26: Consumer Price Index for food and non-alcoholic beverages, 2018-23

Figure 27: Issues that have affected consumers in the last 2 months, lol, 2022-23

- **Many consumers still report tight finances**

Figure 28: How consumers describe their current financial situation, lol, 2022-23

Figure 29: How consumers rate their financial situation compared to 12 months previously, lol, 2022-23

INNOVATIONS AND COMPANIES – WHAT YOU NEED TO KNOW

- **Pet health is a key concern for pet owners**
- **Impact of the cost-of-living crisis**
- **Sustainability plays a key role in brand developments and innovations**

WHO'S INNOVATING?

- **Humanisation – health and wellbeing**
- **Rise in homemade and subscription-based pet food companies**
- **Collagen**
Figure 30: Pet foods launched containing collagen as an ingredient, global, 2018-23
- **Supplements on the rise**
Figure 31: Pet food launches with prebiotic and/or probiotic claims, Global, 2018-23
- **Freeze-dried food**
Figure 32: Global product launches for freeze-dried pet food, 2018-23
- **Bringing more sustainable practices to pet food**
- **Insect-based protein**

COMPANIES AND BRANDS

- **Asda**
- **Key facts**
- **Product portfolio**
- **Brand NPD**
- **Gary's Pet World**
- **Key facts**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £1495 | \$1995 | €1800

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

- Product portfolio
- Irish Dog Foods
- Key facts
- Product portfolio
- Brand NPD
- Recent developments
- Jollyes
- Key facts
- Product portfolio
- Recent developments
- Mars Ireland
- Key facts
- Product portfolio
- Brand NPD
- Recent developments
- Maxi Zoo
- Key facts
- Product portfolio
- Recent developments
- Nestlé Purina Petcare
- Key facts
- Product portfolio
- Brand NPD
- Recent developments
- Petstop
- Key facts
- Product portfolio
- Recent developments
- Petmania
- Key facts
- Product portfolio
- Recent developments
- Pets at Home
- Key facts
- Product portfolio
- Brand NPD
- Recent developments
- Tesco
- Key facts
- Product portfolio
- Brand NPD

What's included

- Executive Summary

- Full Report PDF

- Infographic Overview

- Powerpoint Presentation

- Interactive Databook

- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

THE CONSUMER – WHAT YOU NEED TO KNOW

- **Strong usage of pet toys**
- **Use of dry food most common for cat/dog owners**
- **NI owners more likely to insure**
- **Pets are family in the eyes of most Irish owners**
- **Pets viewed as expensive**

PET ACCESSORIES

- **Most pet owners bought toys in the past year**
Figure 33: Types of pet accessories that consumers have bought in the last 12 months, NI and RoI, 2022
- **Toy purchasing declines with age**
Figure 34: Consumers who have bought pet toys in the last 12 months, by gender and age, NI and RoI, 2022
- **Decline in Christmas/Halloween items for pets**
Figure 35: Consumers who have bought Christmas items in the last 12 months, NI and RoI, 2020 and 2022

DOG AND CAT FOOD

- **Dry food – the most commonly used**
Figure 36: Types of pet food that consumers typically buy for their cats and dogs, NI and RoI, 2022
- **Women more likely to buy dry food for dogs; men dominate wet food**
Figure 37: Consumers who typically buy dry and wet food for their dogs, by gender, NI and RoI, 2022
Figure 38: Consumer interest in healthy eating initiatives, NI and RoI, 2022
- **Dog owners more likely to buy treats**
Figure 39: Consumers who bought snacks/treats for their dog and/or cat, NI and RoI, 2020 and 2022

PET INSURANCE

- **RoI pet owners still lag in insurance ownership**
Figure 40: If consumers have pet insurance for any of their pets, NI and RoI, 2020 and 2022
Figure 41: Agreement with the statement 'The cost-of-living crisis has seen me move to cheaper pet insurance/cancel my cover', NI and RoI, 2022
- **Lifetime cover the most common insurance used**
Figure 42: Level of pet insurance cover, NI and RoI, 2022
Figure 43: Agreement with the statement 'I am confident that my insurance provides enough cover to pay for any treatments my pet may need', NI and RoI, 2022

What's included

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

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

Report Price: £1495 | \$1995 | €1800

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

PET BEHAVIOURS

- Pet owners treat their animals as family members**
 Figure 44: Agreement with statements relating to pets, NI and Rol, 2022
- Affluent NI pet owners more likely to view pets as family**
 Figure 45: Agreement with the statement 'I treat my pet(s) like members of the family', by socio-economic group, NI and Rol, 2022
- Younger pet owners more likely to use accessories to engage pets mentally**
 Figure 46: Agreement with the statement 'I like pet toys/ accessories that help keep them mentally engaged' by age, NI and Rol, 2022
- Rol pet owners more interested in raw diets for pets**
 Figure 47: Agreement with the statement 'I would like more information on a raw diet for my pet', by gender, NI and Rol, 2022

ATTITUDES TOWARDS PETS

- Three quarters see pet ownership as expensive**
 Figure 48: Agreement with statements relating to pets, NI and Rol, 2022
- Women more inclined to view owning a pet as expensive**
 Figure 49: Agreement with the statement 'Looking after a pet can be very expensive', by gender, NI and Rol, 2022
 Figure 50: Consumers who are mainly/wholly responsible for grocery retailing in a household, by gender, NI and Rol, 2021 and 2022
- Greater need for guidance of healthy pet diets**
 Figure 51: Agreement with the statement 'There should be more guidance on what a healthy amount of food is to give to a pet', by work status, NI and Rol, 2022
- Sustainability more important to younger consumers**
 Figure 52: Agreement with the statement 'Pet food made using sustainable ingredients would be appealing (eg by-products from other food production)', by age, NI and Rol, 2022
 Figure 53: "How environmentally friendly would you say your lifestyle is?", NI and Rol, 2022
 Figure 54: "Compared to a year ago, would you say your lifestyle now is more, about the same or less environmentally friendly?", NI and Rol, 2022

What's included

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

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Data sources**
- **Generational cohort definitions**
- **Abbreviations**

What's included

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

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.