

Pet Food - UK - 2023

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This report looks at the following areas:

- The impact of the cost-of-living crisis on the cat and dog food market.
- The market outlook while real household incomes remain under pressure and as they gain momentum.
- The latest trends in new product development.
- Pet food purchasing behaviour and the influence of the need for cost-saving.
- Consumer attitudes towards pet food including linked to enhancing the pet dining experience.
- Consumer behaviours related to pet food including related to sustainability.

Pet owners recognise the impact of their food choices, with 38% seeing their pet food choice as having a big impact on their environmental footprint. Linked to this, owners show strong interest in various pet foods featuring sustainable ingredients or production. Some 44% of owners would like more mainstream pet food brands to offer food made with insect protein, with half of dog owners saying the same about plant-based meals.

During the cost-of-living crisis and amid rising pet food prices, 62% of cat/dog owners have tried to reduce or limit their spending on pet food, offering yet another demonstration of how widely the squeeze on incomes has been felt. A shift towards economical dry pet food options has led to an estimated 3.4% decrease in cat and dog food sales in 2023, market value growing by 8% to reach £4.0 billion.

The recent disruptions look set to have a significant lasting impact, as 55% of those who have reduced spending on pet food see these changes as permanent, including 59% of those who have switched to cheaper brands or own-label products. This is turning up the heat on the market leaders to step up their NPD in order to establish new points of difference to regain users once



“The cat/dog food market has seen volumes fall in 2022 and into 2023 as pet ownership has fallen and owners have looked to economise on their pet food spend. Many owners see their recent changes as permanent, dialling up the need for engaging NPD for operators to regain interest once real household incomes regain momentum.”

– Chita Erayanie, Research Analyst

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household incomes regain momentum. Added to this, the decline in child population looks set to curb pet ownership over 2023–28.

Elevating the pets’ dining experience continues to hold potential for brands, this also extending to dry food, both while consumer confidence remains weak and once sustainability concerns regain momentum. A substantial 47% of pet owners show interest in dry pet food that can be mixed with water, creating wet alternatives. This concept appeals not just to current dry food buyers but also to 55% of non-buyers, presenting a chance for brands to engage both existing and new customers.

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