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 real household incomes regain momentum.”

– Chita Erayanie, Research 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
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 week 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.
Table of Contents

OVERVIEW

• Key issues covered in this Report
• Products covered in this Report

EXECUTIVE SUMMARY

• Five-year outlook for cat and dog food
  Figure 1: Category outlook, 2023-28
• The market
• Volume sales fall in 2023 while value grows
• Moderate volume sales growth expected over 2023-28, rising prices fuel faster value increase
  Figure 2: Market forecast for value sales of cat and dog food, 2018-28
• Financial strain sees dry food gain share
  Figure 3: UK retail value sales of cat and dog food, by type, 2021-23
• Companies and brands
• Mars brands lose share, Butcher’s gains in dog food
  Figure 4: Leading brands’ sales in the UK retail dog food market, by value, 2020/21-2022/23
  Figure 5: Leading brands’ sales in the UK retail cat food market, by value, 2020/21-2022/23
• Efforts to reduce eco ‘paw prints’ drive activity in the insect-based pet food space
• Premium claims have gained share of launches despite cost-of-living crisis
• Adspend increased slightly in 2022 after a fall in 2021
• The Consumer
• Nine in ten owners buy pet food, one in three feed homemade food or leftovers
  Figure 6: Feeding pets shop-bought food, homemade food and leftovers, by type of pet, 2023
• Three in five cat/dog food buyers have limited their spending
  Figure 7: Methods pet owners have tried to save money on pet food, 2023
• Strong interest in sustainable pet food and scope to spotlight water; interest in homemade food holds potential
  Figure 8: Behaviours relating to pet food, 2023
• Enhancing the eating experience for pets would chime
  Figure 9: Attitudes towards pet food, 2023

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

reports.mintel.com © 2023 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.
ISSUES AND INSIGHTS

Three in five cat/dog food buyers have limited their spending and more than half see the changes as permanent

Strong interest in sustainable pet food with scope for water footprint and alternative proteins to engage

Awareness of pet food’s environmental impact drives interest in better-for-planet variants

Activity in plant- and insect-based pet food remains limited

Enhancing dry food eating experience for pets would chime

Strong interest in dry food designed for soaking

Dry pet food has short- and long-term relevance

Suitability for soaking, topper suggestions and gravies/broths can tap dry-to-wet interest

MARKET SIZE AND PERFORMANCE

Volume sales fall in 2023 while value grows

Figure 10: UK retail value and volume sales of cat and dog food, 2017–23

MARKET FORECAST

Five-year outlook

Figure 11: Category outlook, 2023–28

Modest volume sales growth expected over 2023–28, rising prices fuel faster value increase

Figure 12: Market forecast for UK retail value sales of cat and dog food, 2018–28

Figure 13: Market forecast for UK retail volume sales of cat and dog food, 2018–28

Learnings from the last income squeeze

Forecast methodology

MARKET SEGMENTATION

Financial strain sees dry food gain share

Dog treat volume sales drop as owners economise

Figure 14: UK retail value and volume sales of cat and dog food, by type, 2021–23

MARKET DRIVERS

Pet ownership declines in 2023

Figure 15: Pet ownership, 2020–23

The drop in child population looks set to curb pet ownership

Figure 16: Trends in the age structure of the UK population, 2018 – 2028

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
• Inflation will continue to eat into consumer spending power over the course of 2023
• Further interest rates increases will hit mortgage-holders
• Consumer spending power will be curbed
• Consumers’ financial wellbeing has fallen from the highs of 2021...
  Figure 17: Household financial wellbeing index, 2016–23
• …and most people are feeling the effects of price rises

MARKET SHARE
• Mars brands lose share due to price hike and Tesco supply halt
• Butcher’s overtakes Harringtons to secure top position in dog food in 2022/23
• Lily’s Kitchen continues to grow, Pooch & Mutt acquired in a multi-million-pound deal
  Figure 18: Leading brands’ sales in the UK retail wet and dry dog food market, by value and volume, 2020/21-2022/23
• Purina Dentalife gains share in dog snacks and treats
  Figure 19: Leading brands’ sales in the UK retail dog snacks and treats market, by value and volume, 2020/21-2022/23
• Nestlé Purina brands gain volume share in cat food
  Figure 20: Leading brands’ sales in the UK retail wet and dry cat food market, by value and volume, 2020/21-2022/23
• Felix’s latest ad campaign helps it gain volume sales in cat snacks
  Figure 21: Leading brands’ sales in the UK retail cat snacks and treats market, by value and volume, 2020/21-2022/23

LAUNCH ACTIVITY AND INNOVATION
• Efforts to reduce eco ‘paw prints’ drive activity
• Insect-based pet food continues to attract launches
  Figure 22: Insect-based dog food and treats, UK, 2023
• More activity in plant-based and cell-based meat pet food
  Figure 23: Plant-based dog toppers and treats, UK, 2023
• More efforts to make packaging sustainable
• Biodegradable packaging claims saw an uptick in the first half of 2023
• Economy and premium segments attract NPD during the cost-of-living crisis
• Raw pet food brands look to cater to cash-strapped “pet parents”
Figure 24: Economy dog food launches from Paleo Ridge and ProDog Raw, UK, 2023

- Premium claims have gained share of launches despite cost-of-living crisis
- Premium private label remains active in launches in 2022

Figure 25: Premium dog treats, UK, 2023

- Premium private label remains active in launches in 2022

Figure 26: Private label premium launches, UK, 2023

- Natures Menu and Harringtons refresh packaging

Figure 27: Harringtons’ new packaging design, UK, 2023

- Functional and fortified claims gain share of launches
- Digestion, prebiotic and fortified ingredient claims increase
- Premium activity from mainstream players

Figure 28: Functional dog food and treats, UK, 2023

- Mars Petcare enters the supplement category

Figure 29: Pedigree multivitamin range, UK, 2023

- Humanisation trend continues
- Seasonal pet food mirrors celebratory dishes from human cuisine
- Pet treats take inspiration from human food

Figure 30: Limited edition and seasonal new launches, UK, 2023

Figure 31: Share of pet food launches carrying selected claims, 2018-2023

**ADVERTISING AND MARKETING ACTIVITY**

- Adspend increased slightly in 2022 after a fall in 2021

Figure 31: Total above-the-line, online display and direct mail advertising expenditure on pet food, 2019-23

Figure 32: Total above-the-line, online display and direct mail advertising expenditure on pet food, by advertiser, 2019-23

- Pet food advertising echoes humanisation in the category
- Robbie Williams becomes the new voice of Purina’s Felix
- Lily’s Kitchen promotes proper food for pets
- …and introduces a train for pets
- Butcher’s Valentine’s Day promotion recreates romantic movie moments
- Whiskas frames its cat food as the choice of fussy felines
- Pet food brands promote strong bonds between humans and pets
- Pets at Home marks brand refresh with a new advert

**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
• Tails.com highlights that ‘Every Dog is Different’ in new campaign
• Royal Canin introduces the ‘Unleash Their Potential’ campaign
• Naturo introduces a new ‘nose best’ campaign with a TV advert
• Burns launches a new campaign to mark its 30th anniversary
• Brands work with experts to enhance trust
• Nielsen Ad Intel coverage

PET FEEDING BEHAVIOUR

• Nine in ten owners buy pet food, one in three feed homemade food or leftovers
  Figure 33: Feeding pets shop-bought food, 2020-23
  Figure 34: Feeding pets homemade food, leftovers, shop-bought food and combination, by type of pets, 2023
• Most pet owners buy both wet and dry food
  Figure 35: Types of cat and dog food bought, 2023

HOW THE NEED TO SAVE MONEY HAS CHANGED BUYING BEHAVIOUR

• Three in five cat/dog food buyers have limited their spending
  Figure 36: Methods pet owners have tried to save money on pet food, 2023
• More than half of those economising see the changes as permanent
  Figure 37: Whether pet owners consider their money saving methods permanent or temporary, 2023
• Three-quarters of under-35s pet owners are economising

BEHAVIOURS RELATING TO PET FOOD

• Strong interest in sustainable pet food
  Figure 38: Behaviours relating to pet food, 2023
• Scope to spotlight water
  Figure 39: Food and drink launches calling out water footprint, 2022-23
• Alternative proteins hold sizeable mainstream potential
• Nearly half of owners look for guidance for preparing homemade food
• Pet owners seek technological solutions for pet health assistance
ATTITUDES TOWARDS PET FOOD

- Enhancing dry food eating experience for pets would chime
- Strong interest in elevating dry food to a wet food experience
  Figure 40: Attitudes towards pet food, 2023
- Dry food holds short- and long-term relevance
- Advice on soaking dry food and liquid toppers can tap this interest
- One in three owners think pets would enjoy warm meals more
  Figure 41: Microwavable pouch and instant bone broth, 2022–23
- Two in five pet owners find pet menus when dining out experiences appealing

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations
- Consumer research methodology

APPENDIX – FORECAST METHODOLOGY

- Market forecast and prediction intervals
  Figure 42: Market size and forecast for UK retail volume and value sales of cat and dog food, 2018–28
  Figure 43: Market forecast and prediction intervals for UK retail value sales of cat and dog food, 2023–28
  Figure 44: Market forecast and prediction intervals for UK retail volume sales of cat and dog food, 2023–28
- Market drivers and assumptions
- Forecast methodology

APPENDIX – MARKET SHARE

Figure 45: Leading manufacturers’ sales in the UK retail wet and dry dog food market, by value and volume, 2020/21-2022/23
Figure 46: Leading manufacturers’ sales in the UK retail wet and dry cat food market, by value and volume, 2020/21-2022/23
Figure 47: Leading manufacturers’ sales in the UK retail dog snacks and treats market, by value and volume, 2020/21-2022/23
Figure 48: Leading manufacturers’ sales in the UK cat snacks and treats market, by value and volume, 2020/21-2022/23
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.