

BRAZILIAN PET OWNERS – 2024

Pets' health is a priority; owners invest in holistic care that provides physical and mental health as well as comfort.



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Report Content

EXECUTIVE SUMMARY

- What you need to know

Challenges

- Online stores are still less likely to be used, despite growth
- Preference for food with animal meat challenges production and sales costs
- Pet food with alternative protein

Opportunities

- Pet supplements have the potential to grow in the Brazilian market
- Supplements with mental health and immunity benefits can stand out
- Children's food can inspire pet products

THE CONSUMER

Pet owners overview

- The majority of Brazilian pets are dogs and cats
 - Graph 1: type of pet owned, 2023
 - Graph 2: dogs and cats ownership, 2023
- Specialized stores, local stores and large chains are preferred purchase channels
 - Graph 3: purchase channels, 2023

Purchase of pet products and services

- Supplements and nutraceuticals should growth in the coming years
- Supplements and nutraceuticals should stand out in the coming years
- Immunity and relaxation will be among the priorities for humans and pets
- Prevention of common pet health issues is also a driver
- As well as children, pets need supplements in attractive flavors and easy-to-take formats

Purchase channels and reasons for choosing

- Exclusive brands is a differential for online specialized pet stores
- Online pet stores can invest in exclusive private labels
 - Graph 4: reasons for choosing online specialized pet stores, 2023
- Exclusive private labels grow in ecommerce
- Variety of products and pet care advice are the main reasons for choosing physical stores
 - Graph 5: purchase channels, by pet owners who have purchased six pet products or more, 2023

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- Graph 6: reasons for choosing physical specialized pet stores, by pet owners who have purchased six pet products or more, 2023

- Promote sellers to advisors; events can also strengthen specialized brands
- Online stores can invest in public space actions to show expertise

Pet food flavor

- Valorization of natural ingredients and the usage of animal proteins will press the pet food market
 - Graph 7: pet food flavor, 2023
- Search for balance between savings and sustainability can open space for new ingredients
- Protein blends can offer savings and tasty flavor
- Ingredient of the future, insect-based protein is already used in other markets
- Indulgence can provide fun and integrating experiences for humans and their pets
- Pet food companies can innovate with formats and flavors inspired by celebrations
- Foodservice can attract more customers by including pet food options in the menu

Added benefits in pet food

- Nutrients are fundamental for pet owners
- Children's food category can serve as inspiration
- Pet food inspired by children's food
- Fresh food for pets gain space in the country, whether made at home or purchased ready-to-consume
- Cooking ingredients for pet food should gain space in the Brazilian market

Pet care and grooming

- AB consumers are the most likely to read the product ingredient list before buying bath and grooming products
 - Graph 8: pet care and grooming, by socioeconomic group, 2023
- 'Sulfate-free' claim, common in human personal care categories, gains importance in the pet market

Behaviors of pet owners

- Increased life expectancy of pets and humans will bring opportunities for various segments
- Pets and humans contributing mutually to greater longevity
- While longevity medications are not yet available, pet owners invest in specialized food and therapies for senior pets
- Impacts of climate change on pets will be a significant concern for pet owners
- Measures to avoid hyperthermia at extreme temperatures are fundamental
- Helping pet owners ensure adequate hydration
- Clothing and accessories can offer greater thermal comfort on hot days
- After walks, it is necessary to lower the temperature gradually
- Pet skin protection will gain greater relevance in the care routine
- Experiences for pet and pet owners attract young women; clothing and accessories can make pets more stylish and prepared for the walk
- Gastronomic and instagrammable experiences can engage young women and strengthen the image of pet brands

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- Luxury experiences for pets and humans should gain space on social media
- Puppy Lounge, a restaurant that offers a luxury tasting menu for dogs in South Korea
- With pet owners looking forward to spending more time with their pets, other experiences should be popularized

KEY PLAYERS

Companies and brands

- Petz repositions brand and plans to go beyond retail, becoming an ecosystem of pet services

Launches and innovations

- BRF launches GUD, a new brand of pet supplements
- Whiskas reformulates recipes and modernizes packaging visual communication
- Human product brands enter the pet market
- Melissa launches pets collection

Marketing campaigns and actions

- Petlove promotes pet adoption event, strengthening the brand image as a pet advocate

THE MARKET

- Pet market maintains growth and achieves 3rd highest global revenue
- Pet food accounts for the largest share of revenue but other segments have greater growth potential
 - Graph 9: revenue contribution, 2023
 - Graph 10: pet segments growth, 2022-23
- Small shops account for most of the market

APPENDIX – DEFINITION, METHODOLOGY AND ABBREVIATIONS

- Report definition
- Methodology
- Abbreviations

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