

PET FOOD – GERMANY – 2019

Pet food brands have innovation opportunities in natural, clean label, single-protein and ancestral diet recipes as well as functional benefits for older pets.



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Report Content

EXECUTIVE SUMMARY

- Mintel's perspective

Market context

- Levels of pet ownership drive sales
- Pet food brands face competition from homemade options
- Pets are becoming obese

Mintel predicts

- Pets are a valued family member
- Market will continue struggling to add value
- Value sales set to grow only in line with inflation
- Volume sales forecast to level off

What consumers want, and why

- Consumers want: To know more about ingredients
- Consumers want: Natural ingredients
- Consumers want: Gourmet pet meals

Opportunities

- Offer wellness benefits for elderly and anxious pets
- Supporting pets' emotional wellbeing will become increasingly important
- Borrow language from the beauty industry
- Look for more sustainable options: Insect protein
- More sustainable options: lab-grown meat and food waste

The competitive landscape

- Private label in the lead
 - Graph 1: value and volume shares of pet food sales by company, 2018

MARKET DRIVERS

- Pet food sales directly related to numbers of pets owned
 - Graph 2: type of pet owned, July 2019
- Volume sales of dog food held back by rising ownership of small breeds
- Private label is strong in the pet food market, holding back value growth
- Rising obesity in pets needs addressing

- Pet food for calorie-controlled diets
- Competition for pet food brands from homemade
- Highlight nutritional superiority alongside 'homemade' credentials

WHAT CONSUMERS WANT, AND WHY

Types of pet food bought and benefits sought

- Pet owners strive to provide a varied diet
 - Graph 3: consumers who buy treats for their pet, July 2019
 - Graph 4: types of food bought for cats and dogs, July 2019
- All-natural pet foods with functional benefits are most desirable
 - Graph 5: benefits sought when buying pet food, July 2019
- Older pet owners and dog owners more inclined to look for all-natural ingredients
 - Graph 6: "It is important to check pet food labelling to ensure there are no hidden ingredients", 2017
- Grain-free has high interest, but has recently seen controversy
 - Graph 7: concern about personal factors, men vs women, 2019

Attitudes towards pet health and their diets

- Holistic healthcare for pets
- Pet food brands can act as wellness advisers
 - Graph 8: agreement with statements related to holistic wellbeing, July 2019
 - Graph 9: attitudes towards certain pet food ingredients, July 2019
- Consumers are interested in plant-based pet foods and gut health additives
 - Graph 10: pet owners who consider their pet a "foodie", July 2019
 - Graph 11: leading flavour components in pet food NPD, Oct 2015-Sep 2016 vs Oct 2018-Sep 2019
- Cold-pressed technology perceived as higher-quality

Attitudes towards ingredient sourcing and traceability

- Build trust with local ingredients and show provenance
 - Graph 12: attitudes towards ingredients and provenance, July 2019
 - Graph 13: consumers who try to buy pet food from environmentally friendly companies, July 2019
- Germany pioneers insect-based pet foods

Interest in new pet food concepts

- Looking after pets' emotional wellbeing
- Tackling pets' anxiety with functional ingredients
 - Graph 14: interest in pet foods with wellness ingredients, July 2019
- On-trend ingredient CBD for stress relief benefits
 - Graph 15: interest in personalised pet nutrition, July 2019

- Graph 16: interest in having freshly made pet food delivered to home, July 2019

LAUNCH ACTIVITY AND INNOVATION

- Graph 17: pet food NPD by cat vs dog, Oct 2015-Sep 2019
- Graph 18: pet food NPD by sub-category, Oct 2015-Sep 2019
- Pet food brands appeal to an increasingly health-aware pet owner
 - Graph 19: top 10 claim categories for pet food, Oct 2018-Sep 2019
- More launches with no added sugar
 - Graph 20: pet food NPD with no added sugar claim, Oct 2015-Sep 2019
 - Graph 21: pet food NPD by leading functional claims, Oct 2018-Sep 2019
- Opportunities for pet food with anti-ageing benefits
 - Graph 22: leading natural claims for pet food NPD, Oct 2018-Sep 2019
- Limited Ingredient Diet and single-protein recipes perceived as more natural
 - Graph 23: pet food NPD featuring selected ingredients*, Oct 2018-Sep 2019
- Plants make their way into dog meals and treats
- Importance of ethical & environmental claims
 - Graph 24: leading ethical & environmental claims for pet food NPD, Oct 2018-Sep 2019

MARKET SHARE

- Private label in the lead

Germany: company retail market share of pet food by volume, 2017-18

- Private label takes over half of volume sales

Germany: company retail market share of pet food by value, 2017-18

- Private label accounts for almost 40% of value sales
- Private label also responsible for almost four in ten product launches
 - Graph 25: NPD share by brand and private labels, 12 months to Sept 2019
- Fressnapf is the most important specialist pet food retailer
- Pet Bowl YouTube channel
- Online trade established as a relevant distribution channel

MARKET SEGMENTATION, SIZE AND FORECAST

- Germany's pet food market is mature and slow-growing
- Value growth held back by the strength of lower-priced private labels
- Wet cat food and dry dog food go into decline in 2019

Germany: pet food retail sales by segment, cat vs dog, 2016-18

- Dog food marginally outperforms cat food in volume and value terms

Germany: cat food retail sales by segment, wet vs dry, 2016-18

- Cat food by type

Germany: dog food retail sales by segment, wet vs dry, 2016-18

- Dog food by type

APPENDIX

Appendix – Products covered, abbreviations and consumer research methodology

- Products covered in this Report
- Abbreviations
- Consumer research methodology

Appendix – Market size and forecast

- Forecast methodology
- Forecast methodology – Fan chart

Germany: retail value sales of pet food, 2014-24

- Market size and forecast – Value

Germany: retail volume sales of pet food, 2014-24

- Market size and forecast – Volume

Germany: retail value sales of pet food, best- and worst-case forecast, 2019-24

- Market size and forecast – Value – Best- and worst-case

Germany: retail volume sales of pet food, best- and worst-case forecast, 2019-24

- Market size and forecast – Volume – Best- and worst-case

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