PET FOOD – GERMANY – 2021

Pet humanisation trends give pet food brands an opportunity to focus on warding off lifestyle diseases and helping to maintain pets' cognitive health.

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Report Content

EXECUTIVE SUMMARY

MARKET DRIVERS

- COVID-19: market context
- The impact of COVID-19 on the German economy
  - Graph 5: key economic data, in real terms, 2019-22
- A third of Germans are worried about lifestyle impact of COVID-19
  - Graph 6: extent to which people are worried about the impact of COVID-19 on their lifestyle, 2020 and 2021
- COVID-19 accelerates growth of online shopping
  - Graph 7: changes in shopping habits since the start of the COVID-19 outbreak, 2020 and 2021
- Number of pets increases
- Obesity is a health issue for pets

WHAT CONSUMERS WANT AND WHY

The impact of COVID-19 on consumer behaviour

- Small rise in cat ownership in lockdown
  - Graph 8: type of pet owned, 2019 and 2021
- Young adults like the companionship of a cat
  - Graph 9: cat ownership, by age, 2019 and 2021
  - Graph 10: dog ownership, by age, 2019 and 2021
- Higher attention paid to eating healthily
  - Graph 11: frequency of eating healthily, 2020 and 2021

Types of pet food given to pets

- High interest in homemade pet food…
  - Graph 12: buying and making pet food, 2019 and 2021
- …but most pets eat a mix of bought wet and dry food
  - Graph 13: types of food bought for cats and dogs, 2021
- Move toppings into supplements

Where pet food is purchased

- In-store remains most popular purchase channel
  - Graph 14: how pet food is typically bought, 2021
- Fressnapf is the key pet food outlet
  - Graph 15: where pet food is typically purchased, 2021
- Food discounters appeal when finances are tight
  - Graph 16: top four outlets for purchasing pet food, by financial situation, 2021
- Online-only pet food retailers lead over Amazon

- Graph 17: online-only retailers shopped at for pet food, by gender and type of pet, 2021

Interest in pet food/drink concepts

- People increasingly want to know where pet food comes from
  - Graph 18: interest in pet food/drink concepts, 2021
- Appeal to buyers with German sourced and seasonal ingredients
- Show how pet food contributes to food waste prevention
- More pet food brands explore insect protein
- Latest introductions from Nestlé and Mars
- Promote gut health benefits
- Soothe anxious pets (and their owners)
- Opportunity for gourmet formats and meal kits

Attitudes towards pets and pet food

- Pet food buyers prioritise quality over price
  - Graph 19: attitudes towards pets and pet food, 2021
- Pet owners look to support their pet's brain health
- Opportunities to facilitate homemade pet food
- Help guide pet owners to support their pet's healthy weight
- Encourage social media support

Attitudes towards pets' diets

- Plant-based trend has much more opportunity to take off in dog food
  - Graph 20: attitudes towards pets' diets, 2021
- Look to include wellness ingredients in pet foods
- Grain-free and raw diets are seen as healthy for pets

LAUNCH ACTIVITY AND INNOVATION

- Private labels launched almost half of products in 2020
  - Graph 21: pet food NPD by brands and private labels, 2020
- Snacks and treats take biggest share of NPD
  - Graph 22: pet food NPD by sub-category, 2017 and 2020
  - Graph 23: pet food NPD by cat vs dog, 2017 and 2020
- Pet food NPD increasingly takes its cue from human food trends
- More scope for plant-based pet foods
- Vegan dog food is an investment opportunity
- No added sugar claims increase
  - Graph 24: pet food NPD with low/no/reduced sugar and fat claims, 2017 and 2020
- Fortification claims are also on the rise

- Add ingredients for new benefits
- On-trend non-meat ingredients
  - Graph 25: pet food NPD with select ingredient types*, 2017 and 2020
- Brands investigate new protein sources
  - Graph 26: pet food NPD by protein* sources, 2017 and 2020
- Insects gain consumer acceptance in pet foods
- Supplement opportunities
- Younger pet owners want to include them in social occasions
- Appealing to younger pet owners' food tastes

MARKET SHARE

- Private label enjoys strong market leadership

Company retail market share of pet food by value, 2019-20

- Private label has over a third of value sales

Company retail market share of pet food by volume, 2019-20

- Private label takes a touch over half of volume sales

MARKET SIZE, SEGMENTATION AND FORECAST

- COVID-19 gave a boost to pet food sales
- More time and spend lavished on pets
- Volumes rise less strongly

Pet food retail sales by segment, cat vs dog, 2019-20

- Dog and cat food categories perform similarly over 2019-20

Pet food retail sales by segment, wet vs dry, 2019-20

- Dry food grows moderately faster than wet

COVID-19 SCENARIO PERFORMANCE

- Mintel's approach to predicting the impact of COVID-19
- Fundamental differences in how COVID-19 is affecting consumer markets
- The risk of vaccine-resistant strains of COVID-19 adds huge uncertainty
- Little variation between scenarios over the longer-term
- Volume sales forecast to show a similar pattern to value
- COVID-19 market disruption: risks and outcomes

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – market size and central forecast methodology

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- Market size and forecast – value
- Market size and forecast – volume
- Market forecast and prediction intervals – value
- Market forecast and prediction intervals – volume

Appendix – COVID-19 scenario performance methodology and assumptions

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- Scenario performance - volume
- Rapid COVID-19 recovery scenario outline
- Central COVID-19 disruption scenario outline
- Extended COVID-19 disruption scenario outline
- Scenario methodology

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