



Pet Fair Asia

Attending Pet Fair Asia in Shanghai, China, on August 24 was energy packed!

This is the 20th anniversary of one of the fastest growing pet food industry trade shows in the world. Due to its expansion, they moved into the larger Shanghai New International Expo Centre, but it seemed no less crowded than last year. They now report 1400 exhibitors and 32,000+ professionals in attendance.

My pet food industry coworkers, from China and Thailand, and I (see picture) discovered even more new pet food companies and new brands this year, indicative of the rapid market growth.

Unlike other markets, most of the pet foods on display have the appearance of high-end premium brands regardless of their price point.



This is one market worth investing in!

Sincerely,
Jeff Alix,
Global Marketing Manager Pet Nutrition



Top five dog and cat nutrition concepts from consumer insights studies in Western Europe, North America, and Latin America

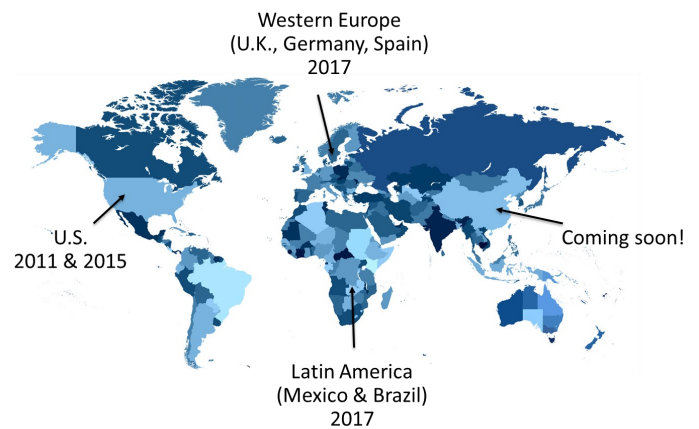
Those attending the Petfood Forum China, co-located with the Pet Fair Asia, you would have heard me present a session with this title. Although I was addressing an audience participating in, or interested in, the pet food industry in China, highly consistent consumer data across the other regions compelled me to share those results. The following is a summary.

The global pet food market is both fertile and dynamic, and the premiumization trend obvious. Most premium food brand owners are seeking points of differentiation using a variety of brand messaging that connects with some pet parents but is rejected by others, for example emphasizing the benefit of fruits and vegetables compared to a meat-first presentation. Regardless, emphasis on the type and quality of ingredients contained in the pet food drives this premiumization trend resulting in more brand owners seeking new and novel ingredients.

This can be limiting considering new and novel ingredients require a robust supply chain, plus food for dogs and cats is highly regulated and the registration investment can be out of reach for most companies. Focusing on already registered functional ingredients is often the better option because there is typically a substantial base of scientific evidence supporting their use. The challenge becomes understanding consumer awareness and perceptions to create a more compelling story surrounding those ingredients, providing consumers with a reason to believe in the new brand messaging.

With global pet food brands taking top share positions in most major pet food markets and consumers having ready access to worldwide digital communications, it is easy to comprehend why there are similarities in consumer perceptions regarding various topics related to nutrition. Nutrition remains a powerful marketing tool in both human and pet food markets. Measuring consumer insights related to nutritional concepts in major pet food markets allows us an opportunity to identify key consumer perceptions that can create more differentiating brand messaging.

DSM has conducted pet consumer insight studies in the U.S., UK, Germany, Spain, Brazil, and Mexico. From these studies we were able to identify nutritional concepts that resonated with pet owners in these three world regions and learn what messaging was understood, meaningful and attractive. This information can provide brand owners with evidence supporting the development of robust nutrition related messaging, and support brand positioning, particularly in emerging markets such as China.



One of the top five concepts shared during my talk pertains to joint health.

Many brands use messaging surrounding support for joint health, and often highlight special ingredients such as glucosamine or chondroitin as a reason to believe in the stated joint health claim. This approach has become common messaging, even on brands sold at the lowest price point. Our data reveals that pet owners respond strongly to a more pragmatic conceptual approach to this topic.

For example, the food concept “Active Mobility” was designed to address multiple dimensions related to the real challenges pet owners face relative to this topic. Knowing these pet parents have experienced similar challenges themselves, or via loved ones, the following concept messaging tested was shaped to align with these personal experiences.

Active Mobility® provides a synergistic complex of functional nutrients that together help support your dog or cat’s joints:

- **Added omega-3 DHA, sourced from DHAgold®, a high quality marine algae, helps support joint flexibility. Omega 3 DHA sourced from algae is a more sustainable source of omega 3 DHA than fish oil that is commonly used!**
- **Added glucosamine plus chondroitin nutritionally help support joint functionality.**
- **Balanced amounts of calcium and phosphorus, plus optimal supplementation with vitamins D and K, help support strong bones.**
- **Added carnitine supports conversion of fat into energy to help maintain your dog’s healthy body weight, an essential for good mobility.**



⇒ Most pet parents believe bone and joint issues can be prevented with proper nutrition, and why not – that is a key message we receive for our own joint health!

73% agreed “It makes sense to use a fish free and more sustainable source of DHA omega-3, such as the whole marine algae, DHAgold, that is naturally rich in omega-3 DHA rather than fish oil.”

⇒ DHA omega-3 is seen as another key nutrient supporting joint health. We also discovered once again that consumers accept algae as a source of DHA and an alternative to fish oil.

The Active Mobility pet food concepts were a combination of the DSM “Activating Life” and “Enhancing Mobility” nutritional concepts, both extremely attractive when each were tested as individual pet food concepts.

This approach of combining the two top nutritional concepts resulted in identifying important and unique connections between nutrition, mobility related health benefits, and behaviors that can be used to drive stronger brand messaging.

The following are a few of the pet consumer study insights that demonstrate these connections to the concept:

80% strongly agreed “Healthy bones and joints are necessary for my cat/dog to have unrestricted mobility for maintaining an active lifestyle.”

⇒ Healthy bones and joints are connected to an active lifestyle, a concept linked to important issues like weight management.

71% strongly agreed “I am concerned about my dog’s bones and joints as he/she grows older.”

⇒ The average dog population worldwide is getting older. Bone and joint health claims are now even more pertinent.

63% strongly, 84% somewhat agreed “Nutritionally supporting my cat’s/dog’s joints from a younger age will help my cat/dog remain healthier and more active as he/she gets older.”

Other insights from these studies helped us to better understand that the mutual interaction pet parents have with their pet is important and linked to mobility; Like the man I saw in the park in Sydney today playing fetch with his dog! Therefore, managing joint health as their pet gets older is a major and compelling concern that will drive food purchases, and hence why we saw high purchase intent scores for the Active Mobility pet food concept.

We have several studies related to the mobility topic that revealed the strength of leveraging natural and sustainable sources of nutrients, that support bone and joint health, like DHAgold. Word selection can be derived from the insights to build a more compelling value proposition.



Industry experts tell us that the consumers driving most of the super-premium pet food growth observed across most markets are shrewd critics with less brand loyalty. They read labels and seek to validate claims via digital media. The brands that will flourish in this instant information age are those with valid messages that tell a compelling and convincing story.

DSM’s nutritional concepts are built on solid scientific evidence, not simply extrapolations from human evidence or general perceptions. Combining real evidence based health benefits with messaging from pet consumer insights becomes a powerful tool our customers can use to strengthen their brand. Please let us know how we can help you build a better brand!