

Consumer trends drive pet food sector development globally

Myriam Snaet and Ben Cottonie - BENEО

Trends in consumer behavior are heavily influencing new product development in the companion animal sector. With pet product innovation often following human trends, Myriam Snaet (head of market intelligence and consumer insights) and Ben Cottonie (country manager of animal nutrition) at German nutrition company BENEО explore the increasing focus on health and wellness, and how this trend is being addressed within functional pet food nutrition ingredients.

Pet care is a highly emotive subject and many people consider their pets to be a part of the family. With this in mind, many of the trends that we are seeing in the consumer arena are crossing over to the pet population.

The most important factor driving purchasing decisions across the globe is quality, according to GlobalData. Worldwide this is the key driver for 41% of pet product purchases, followed by price and promotions (31%) and familiarity with the brand/product (13%).

The influence of consumer trends on the pet food sector can be seen in recent BENEО research. We surveyed five countries – Germany, the UK, the US, China and Brazil – with 81% of UK pet owners ‘completely’ or ‘somewhat’ agreed they wanted to see the same quality standards in pet food as for their own food.

According to research by GlobalData, 56% of pet owners globally ‘somewhat or completely agree’ with the statement that their choice of pet products is a reflection of personal values and preferences. It is no surprise therefore that the marked growth in interest in health and wellness amongst consumers is aligned to this aspect of the pet product market.

All things natural

Another highly influential trend for pet foods is ‘natural credentials’. This again reflects the mainstream consumer move towards clean label purchasing and the increase in shoppers looking at the ingredient label before they buy.

A recent survey on clean label purchasing by BENEО showed that when shopping for a new product, 51% of shoppers in the UK, the US and

Table 1: Examples of scientific intervention studies including one meta-analysis of the beneficial influence of Orafiti® Inulin and Oligofructose on the composition of the intestinal microbiota of dogs and cats.

Reference	Animal	Ingredient, % diet	Effect
Patra, (2011) Meta-Analysis (16 prebiotic studies)	Dogs	Mostly Inulin and Oligofructose: 0.39-7 %	↑ Bifidobacteria ↑ Lactobacilli (with increasing dose)
Barry et al. (2010)	Cats	Oligofructose / Inulin mixture: 4 %	↑ <i>Bifidobacterium</i> spp. ↓ <i>E. coli</i>
Flickinger et al. (2003)	Dogs	Oligofructose: 0.3, 0.6 and 0.9 %	↗ Bifidobacteria at 0.9 %
Apanavicius et al. (2007)	Dogs	Inulin: 1 %	↑ Lactobacilli
Beynen et al. (2002)	Dogs	Oligofructose: 1 %	↑ Bifidobacteria ↗ Lactobacilli
Sparkes et al. (1998)	Cats	Oligofructose: 0.75 %	↗ Lactobacilli ↓ <i>E. coli</i> ↘ <i>Clostridium perfringens</i>
Beloshapka et al. (2013)	Dogs	Inulin: 1.4 %	↑ <i>Lactobacillus</i> spp. ¹ ↑ <i>Veillonellaceae</i> ↑ <i>Megamonas</i> ↓ <i>Enterobacteriaceae</i> ↓ <i>Fusobacterium varium</i>

¹The increase in *Lactobacillus* spp. was significant compared to another intervention group (yeast cell wall extract).

Germany now look at the ingredients list, compared to 45% looking at the brand name.

According to this pet food survey, over half (52%) of pet owners in Germany, the UK, the US, China and Brazil, claim seeing “made with natural ingredients” on a product really influences the likelihood for them purchasing it. Additionally, 48% said they are more likely to buy products that have the “free from artificial ingredients” claim. The survey also revealed ‘natural’ is the top segment type for food purchasing, with 38% of dog owners and 34% of cat owners buying based on this characteristic alone.

The growth of health and wellness

As consumers aspire to particular personal health goals, products that are perceived to improve the health of their pets are actively being sought. When asked whether owners considered the health aspect when buying food for their pet in the BENEО survey, 51% of dog owners in Germany, the UK, the US, China and Brazil said they ‘completely’ agree with that statement, as did 45% of cat owners.

When considering the information on-pack before purchasing, pet owners’ concerns for health and wellbeing are clearly highlighted. According to BENEО research, nutritional information – such as the product’s protein content – is ‘always’ or ‘usually’ a consideration for 69% of pet owners in the five surveyed countries. This is closely followed by health claims such as joint care or statements including “helps maintain a healthy digestion” etc. These are seen as ‘always’ or ‘usually’ important to 68.5% of pet owners.

BENEO's non-GMO vital wheat gluten and rice protein have a protein density of approximately 80%, making them highly concentrated vegetable proteins and a sustainable alternative to animal proteins. According to BENEO's pet food survey, 82% of pet owners think protein increases the health appeal of pet food by 'some' or 'a lot'. Both wheat gluten and rice protein are well known for their high digestibility – higher than any commonly used animal and vegetable protein source.

Impact of digestive health

With two-thirds (78%) of people saying digestive health is 'extremely' or 'very important' to them, it is clear consumers are becoming more familiar with the gut microbiome and its influence on the body. This is being reflected in pet care.

When asked about a range of health concerns that can benefit from dietary changes, digestive health – such as stool consistency and flatulence – came out on top for 95.3% of pet owners according to BENEO research. This is reflected by the fact 83% of pet owners are highly concerned with the digestive health of their pet, with 46% saying it is 'extremely important' and 36% believe it is 'very important'.

Foods that claim to support digestive health are the preferred way to look after the digestive health of pets. BENEO research shows 39% of owners always choose foods to improve their pet's digestion, 58% usually picking those options and only 6.5% using medication to solve digestive difficulties. The digestive health claims that pet owners most prefer on-pack are ones that refer to 'supporting a healthy and balanced digestive system' and 'promoting digestive health naturally', as these tie into consumer's key motivations for all things healthy and natural.

The prebiotic effect of chicory root inulin and oligofructose on the human and animal digestive tract has been studied extensively for over two decades. The beneficial influence of BENEO's Orafit Inulin and Oligofructose on the composition of the intestinal microbiota of dogs and cats has been proven through various studies, including the curbing of appetite and lowering of blood sugar levels, calcium absorption in healthy dogs, blood glucose management in overweight dogs and the reduction of odor in fecal matter in both cats and dogs.

Perception of ingredients

Having explored the key trends in pet products, it is no wonder pressure is being placed on manufacturers to take a long look at the ingredients used in pet foods.

When asked which ingredients pet owners considered

healthy for their pets, rice is seen as 'very healthy' or 'healthy' by 50% of respondents, followed by corn (37%) and wheat (36%). The BENEO research asked owners to choose which ingredients seemed the most healthy/natural to them. Unsurprisingly, the top ranked ingredients were those with names that referred to natural and known ingredients, such as rice protein, chicory root fiber, which sounds natural to 64% and 'prebiotic' sounding healthy to 68%.

With such a focus on health and wellbeing and cleaner label products, functional ingredients such as chicory root prebiotic fibres, rice proteins and starches are proving very popular with pet food manufacturers. As well as promoting digestive health, these functional ingredients have a wide range of other technical and nutritional benefits that can help pet owners to manage their animal's weight, improve hair quality and promote healthier, happy pets.

There is a significant opportunity for new product development for pet food manufacturers over the coming years. However, to be able to respond to consumer demands for high-quality, natural and clean label products with scientifically proven health benefits is challenging. With the added focus on health and wellness and digestive health, the key to success for manufacturers is choosing the right functional ingredients and, at the same time, match the high-quality demands of the pet owner.

Working closely with experienced functional ingredients providers, will enable manufacturers to deliver more on-trend products that promote a range of health and wellness benefits to a global audience of animal lovers.

About the Authors: After graduating with a master's degree in Roman languages at the University of Leuven, MS Snaet built up around 17 years of market analysis and consumer research experience in the consumer goods and B2B sectors. Together with her team of three market and consumer insight experts, she monitors trends and supports customers with research and insights on BENEO's ingredients.

Mr Cottenie graduated as an agricultural engineer at the University of Ghent, Belgium in 2010. After several years working with animal feed, mainly ruminants and swine, he joined BENEO as the country manager animal nutrition for The Americas, focusing strongly on companion animals.