

Market Intelligence Digest

Volume 3 Issue No. 14 | April 2021



Highlights

- This issue features how pet supplements can target many different areas of health that pet owners are interested in.
- The report focuses on the following topics:
 - > Educating pet owners about how supplements can help – and harm their pets' health
 - > New formats like drinks and waters will blur the boundaries of pet supplements with functional food and drink
 - > Functional treats with added health benefits must address the energy balance to avoid weight issues in pets
 - > Personalized diets for pets can deliver 'complete nutrition' through total diet plans including food, drink, treats, and supplements.
- EMB recommends exporters to produce and export supplements for pets.

Supplements can support the wellness trend for pets



The wellness trend encourage pet owners to seek supplements for their pets

Consumer aspiration for their pets to share a lifestyle and diet that reflect their own preferences embodies the 'humanization' trend that is shaping the pet food categories.

Consumers focus on their own health, such as their interest in using botanical or protein-based health supplements may mirror their aspirations

for their pets, creating interest in 'humanized' eating patterns for pets, including potential for pet health supplements.

In countries such as the UK, the pandemic is set to drive demand for (human) vitamins and supplements as heightened consumer concern and sense of responsibility towards their health and wellness become a bigger priority.

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Mintel recommends

Help pet owners to safely use pet supplements

Under the 'humanization' trend, pet owners may seek solutions like supplements that offer health and nutritional safety nets to protect their pets' health. However, pet owners need advice on how to use supplements in a way that is not toxic or harmful to pets.

Consider personalized total diets

Personalized 'complete' or 'total' pet diets that include food, drink, treats, and supplements can deliver meal plans that are tailored to a pet's specific needs (such as pets fed on

homemade rather than commercially produced food) while avoiding toxicity or deficiency.

Consider 'better for you' functional treats

Supplement producers should consider non-traditional supplement formats, such as treats in chew or biscuit format. However, producers of functional treats should consider the issue of weight-gain in pets and should focus on calories as well as added functional health benefits from vitamins or minerals, as examples.

Help to educate pet owners about how supplements can help – and harm – their pets' health

The UK Pet Food Manufacturers Association (PFMA) describes supplement as a term generally referring to complementary products offering additional nutrients or functional ingredients, including snacks and treats.

The PFMA discusses that for a healthy pet, generally it is not recommended to add supplement a 'complete' diet because an excess of certain nutrients could be toxic and harmful.

However, even without a medical need for pet supplements, their perceived benefits extend beyond health. Some 27% of US pet owners agree that there is no limit on what they would spend to take care of their pets health, and 89% of Chinese pet owners agree that they use snacks/treats to strengthen the bond with their pet.

The desire to go above and beyond for the health and happiness of a pet suggests a need for pet supplements that are both safe and beneficial for pets' health.

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Personalized diets for pets can deliver 'complete nutrition' through total diet plans including food, drink, treats, and supplements

There may be an opportunity for 'total' or 'complete' food, drink, treat, and supplement meal plans comprising complementary products that together remove the risks surrounding over-nutrition and toxicity. Indeed, safety and science are a priority for pet owners, with 71% of Chinese pet owners agreeing that they tend to have a scientific approach to rearing pets.



Canidae CA:20 with 24g of protein for low activity levels

New formats like drinks and waters will blur the boundaries of pet supplements with functional food and drink



Tally-Ho water enhancers with functional benefits for dogs

To date, few pet food launches come in a drink format, but brands such as Tally-Ho and Wolfspring have experimented with functional drinks for pets, and are likely targeting younger pet owners.

Tally-Ho functional water supplement for emotional health uses L-Theanine to promote calm behavior while the immune health product contains Vitamin C, Vitamin E, and Zinc.

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Functional treats with added health benefits must address the energy balance to avoid weight issues in pets

Consumers' interest in pet foods with health benefits suggests an opportunity for functional treats.

However, health benefits delivered by food rather than supplement format may increase the amount of energy (calories, sugar etc) that a pet consumes.

Indeed, 41% of French pet owners agree that their pet would benefit from losing some weight, and 45% of UK pet food buyers agree that reaching/maintaining a healthy weight is a preferred health benefit in pet food.



LIQ Liquid treat for Dogs. Hip and Joint



Wolfspring Vitamin Blend Drink for Puppies, Adults, and Senior dogs

“Supplements in treat formats such as biscuits or chews could appeal as alternatives to powders, capsules, and other formats that are standard to supplements.”

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The opportunity

Pet owners' interest in going the extra mile for their pets' health and happiness suggests an opportunity for premium products or those that offer something above and beyond pets' basic needs. Supplements that offer superior health benefits such as personalized supplements or functional treats should thrive.

Several factors suggest that pet food holds considerable opportunity for producers. In countries

like the UK, it is expected that shifts in working stand to patterns towards more remote working stands to facilitate growing pet ownership, which will support volume growth in pet food.

In China, increased at-home time after the outbreak will result in rising demand for the companionship of pets and the consumer willingness to adopt scientific approaches to pet care may further promote the premiumization of pet food.

DTI –EMB recommends

Like many pet-loving nations, Filipinos are already embracing the pet-loving culture. The health and well-being of these furry friends are now also prioritized.

There are supplements that would help them

live longer and ensure their safety.

This is also an opportunity for exporters to look into production and export of supplements.



The Department of Trade and Industry - Export Marketing Bureau (DTI-EMB) is mandated to oversee the development, promotion and monitoring of Philippine exports. The DTI-EMB provides the exporters the enabling environment to make them globally competitive.

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