

## Treating (and Supplementing) Pets Like Part of the Family

### More Europeans Are Enriching Pet Health Through Functional Nutrition

#### SEEING PAWSITIVE SIGNS IN EUROPEAN MARKETS

The pet humanisation trend of elevating pets to beloved family members is gaining traction in Europe. While many believe pet health and wellness products are still discretionary purchases, there are signs that more and more pet parents are warming up to the idea of purchasing functional pet products and supplements for their dogs and cats.

#### PROOF THAT WE'RE BARKING UP THE RIGHT TREE



**85% of global consumers** agree that proper nutrition and supplements are as important for their pets as they are for themselves.



**More than half of European pet parents** say they would be willing to pay more for treats with benefits than for treats that don't have a supplementary ingredient.



Approximately **1 in 3 European pet owners** have purchased probiotics for their pets at least once a year.



This report will highlight leading consumer perceptions and purchase drivers within the functional treats and pet supplements space of key European markets. By demonstrating how pet products and supplements are customised to meet pet owners' top concerns, pet brands can build trust in pet health and wellness solutions to encourage product purchase.

Source: ADM Outside Voice<sup>SM</sup>

## PET PARENTS' TOP CONCERNS

Among global consumers, there are some underlying motivations fuelling their growing enthusiasm for functional treats and supplements. Those include wanting to help their pet with a health issue, so they feel better, and ensuring their pets derive pleasure from the product without compromising their health by giving them subpar treats. Positive recommendations from a trusted source like their veterinarian or a pet care professional are also generating acceptance of functional treats and supplements. And, predictably, attractive price points are always appreciated.

# 4

## Top concerns in European markets include:



**1. Healthy aging/  
general wellness**



**2. Mobility and joints**



**3. Dental and oral health**

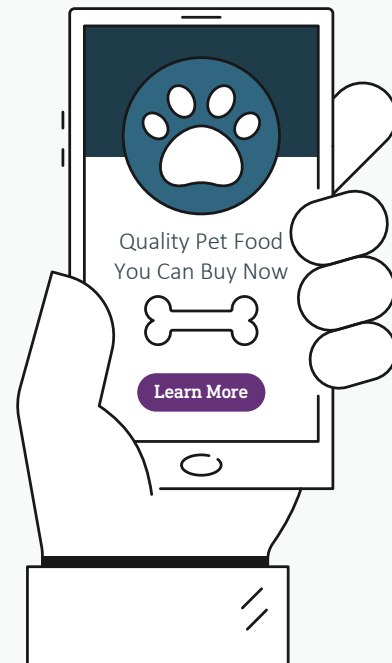


**4. Skin and coat health**

Source: ADM Outside Voice<sup>SM</sup>

European pet parents are more interested in functional treats for issues they can plainly see (or smell) their pets experiencing, like oral health and joint health. These products also have greater availability, accessibility and awareness in the marketplace.

When researching new foods, treats and/or supplements for their dogs and cats, survey respondents often refer to pet stores and websites about pets. However, these consumers overwhelmingly trust recommendations from veterinarians. The internet provides a source of inspiration and industry professionals are a source of authority.



## BRITISH PET PARENTS GET THEIR INFO ONLINE

# 53%

of UK pet owners are **most likely to get information about pet food from websites about pets** when compared to other markets.

# 34%

of UK pet owners **refer to online pet product suppliers, specifically.**

Source: ADM Outside Voice<sup>SM</sup>

## FUN AND FUNCTIONAL TREATS

By taking a more proactive approach to pet care, consumers are showing a willingness to invest in the health of their dogs and cats. They use functional treats not only to provide their pets with nutritional support but enjoyment as well (flavour is a major factor in product development). After all, what's the point of a treat if it doesn't taste good?

### NOT JUST A ONE-TIME PURCHASE

Many European pet owners have purchased functional treats for their pet(s) on a semi-regular basis (at least every two months).

#### POLAND



#### GERMANY



#### UK



#### FRANCE



Source: ADM Outside Voice<sup>SM</sup>

### UNLEASH NEW FORMATS

Innovative functional treat formats are an area of opportunity.



**27% of German pet owners** would like to buy treats as a squeezable paste.



**Different formats or technologies may help preserve active ingredients in the final product.**

Probiotic benefits diminish with high heat from extrusion and baking. Replacing those processes with cold extrusion or using postbiotics are possible solutions.



When it comes to formats, **soft and/or chewy treats are the leader** for most preferred in Europe, followed by crunchy and/or baked treats.

Source: ADM Outside Voice<sup>SM</sup>

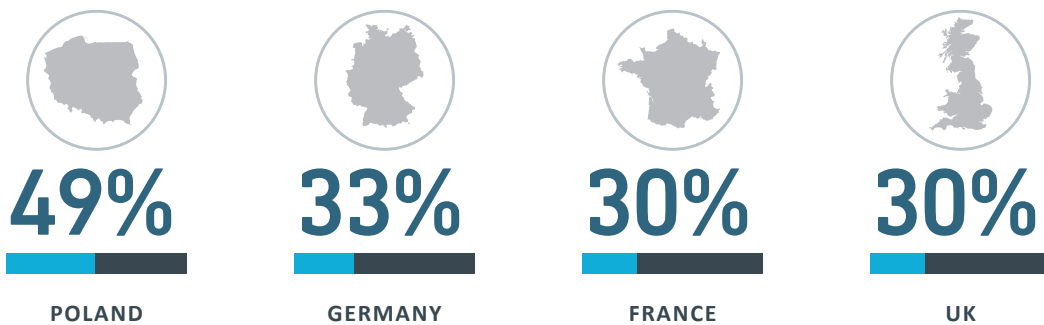
Approximately 56% believe their pets like treats chewy, and 50% want them in cookie or biscuit form. Toppers or mix-ins are also a growing format of interest at 25%. These formats have greater availability and awareness in the marketplace, in part because they are easy to use and convenient for pet owners.

## MICROBIOME MANAGEMENT FOR WELLNESS

Consumers are gaining awareness that the gut microbiome is important to maintaining overall wellness for their pets (and themselves). Biotic ingredients can support a healthy gut microbiome, but the understanding of how that works and what foods or products are effective is still relatively nascent.

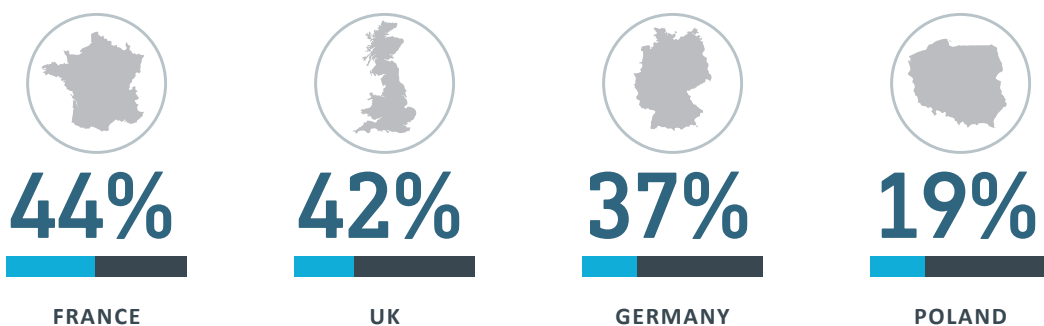
## EDUCATION IS KEY TO TURNING A MICRO TREND INTO A MACRO

The percentage of European pet owners that believe they are knowledgeable about probiotics:



*These numbers just reflect their knowledge on probiotics. There is a drop-off for awareness of prebiotics and postbiotics.*

European consumers who have never purchased biotics for their pets:



Tellingly, **data indicates a correlation between knowledge and purchase.** Poland knows the most about biotics (must be all that sauerkraut—it's very rich in biotics), so 81% have purchased biotics for their pets at least once.

**These numbers indicate that the more consumers know about biotics, the more they are likely to buy them.**

*Source: ADM Outside Voice<sup>SM</sup>*

## MICROBIOME MANAGEMENT FOR WELLNESS *continued...*

Europeans who have never purchased biotics don't buy them for the following reasons:



**1. They are not aware of these products.**



**2. They believe that their pets don't need these products.**



**3. They think these products are too expensive.**

Source: ADM Outside Voice<sup>SM</sup>



Those who do purchase biotics are doing so because they got a recommendation or to help their pet with a specific condition.

**APPROXIMATELY 1 IN 3 EUROPEAN PET OWNERS HAVE PURCHASED BIOTICS AT LEAST ONCE A YEAR BECAUSE OF A RECOMMENDATION:**



**39%**

POLAND



**38%**

GERMANY



**31%**

FRANCE



**29%**

UK

Source: ADM Outside Voice<sup>SM</sup>

**There is one thing that consistently jumps out in the biotics data: consumers are inclined to embrace biotics when they have some knowledge about these ingredients.** There is a clear opportunity for pet brands to help inform consumers about the advantages of biotics in treats and supplements. Expanding awareness through marketing, packaging, and the like can help increase the adoption of these products.

## RETURNS THAT GET TAILS WAGGING

Functional treats and health supplements deliver convenient wellness benefits that pet parents can feel good about adding to their pet's diet. Meanwhile, consumers are gaining awareness on the use of probiotics to help regulate the gut microbiome for both them and their pets.

The evidence is bearing out that demand for functional pet treats and supplements is growing in the European market, and probiotics present an intriguing opportunity to get in early.

Brands that can deliver on evolving pet owner demands will be able to take advantage of an emerging product category with extensive development potential and fetch some significant ROI in the process.



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