

Pet Food Nutraceutical Market - Growth, Trends, and Forecasts (2023 - 2028)

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Report description:

The pet food nutraceutical market is projected to register a CAGR of 4.8% over the forecast period.

Key Highlights

The market for pet nutraceuticals made up of specialized foods, supplements, and functional treats with nutritional ingredients is healthy and consistently growing as more pet owners gravitate toward specialty products to support the health and well-being of their four-legged companions throughout their lifespans.

Gaining popularity of the natural, non-GMO, clean-label movement, holistic wellness, healthy aging, stress relief, and more are also driving the priorities of consumers seeking supplements and foods for their pets. When buying for animals, consumers often look for condition-specific solutions or products that promise overall health and wellness benefits.

The American Pet Products Association (APPA) conducted a survey in 2021 which stated that 42% of dog owners and 43% of cat owners are paying closer attention to their pet's height and weight; 23% of dog owners and 24% of cat owners are especially concerned about their pet's anxiety/stress; and 20% of dog owners and 21% of cat owners are especially concerned about their pet's immune system.

According to the American Veterinary Medical Association (AVMA): "Trends in companion animal nutrition often mirror those in humans, reflecting the desire of pet owners to feed them diets that they consider to be healthy and beneficial for the well-being of their pets." Veterinary data show that 20-30% of dogs and approximately 15% of cats that have been diagnosed with pruritus, allergic skin disease or atopic dermatitis, suffer from cutaneous adverse food reactions (CAFRs), which are likely to represent food allergies (FAs) of immunologic origin. Studies such as these substantiate a driving demand for hypoallergenic ingredients and products that can help owners to support their pet's limited-ingredient diets, as well as the prevention of allergies.

Pet Food Nutraceuticals Market Trends

Increasing Trend of Pet Humanization

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Pet humanization is becoming a globally accepted term in the global pet industry because more and more pet owners want to provide their pets with human-like products or experiences. A study conducted by the American Pet Products Association (APPA) under the National Pet Owners Survey (2020-2021) revealed that more than 90.5 million households in the United States had one or more pets, with a major percentage of households having dogs. Thus, increasing pet humanization is anticipated to drive the pet food nutraceuticals industry.

Further, in China, according to Chinese Pet Industry White Paper Data, in 2021, the pet ownership rate was 58.4% for cats and 52.8% for dogs. Since the rise of the animal welfare movement in China, an organization called Pet Form, which educates and trains stray dogs and cats before returning them to shelters, has helped about 10,000 rescued cats and dogs enter human homes in the eight years from 2011 to 2019. With increased adoption rates, spending on pet food and nutraceutical products for these pets has also increased. Customers are treating pets as a part of the family, and thus, households are beginning to spend on pets on par with children. This has led to an increase in spending on accessories, gifts, treats, etc. In the Brazilian pet food and pet care market, there are nearly 150,000 retail establishments nationwide. More than 90,000 outlets sell pet food products, including pet food nutraceutical products.

North America Dominates the Market

The North American market is the first respondent to any major global trend or consumer pattern; the high level of market penetration and corresponding infrastructure are cited as reasons for the pioneering attitude. The concept of pet humanization is the major trend for pet food markets in the sense of overall pet well-being. One significant outcome of this trend is the consumer's focus on nutraceutical foods and remedies from comfort or treat foods. This focus is well visible in the marketing and new product launches of the major firms.

The United States is expected to lead the pack, followed by Canada and Mexico. The rapid increase in urbanization rates and income levels that are expected of Mexico are fuelling the high expectations of the market. The increasing forces of globalization and infrastructure improvement are giving rise to considerable growth in other regions of North America. According to the American Pet Products Association (APPA), in 2021, the pet industry expenditures accounted for USD 123.6, in which the Vet Care & Product Sales stated USD 34.3 million, and Supplies, Live Animals & OTC Medicine accounted for USD 29.8 million.

Pet Food Nutraceuticals Market Competitor Analysis

The pet food nutraceutical market is a highly consolidated market, contributing almost a majority of the market share as the pet food nutraceuticals market is niche and there is a limited number of players contributing to this sector. These players include BASF, Purina Pet Care, DSM, Kemin Industries, Symrise, Danisco Animal Nutrition, and Boehringer Ingelheim. The greater market share of these players can be attributed to their large geographical presence and highly diversified product portfolios. These players are known to be focusing on R&D, large product portfolio, wide geographical presence, an aggressive acquisition strategy.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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