

# PETFOOD FORUM EUROPE

6 May, 2024

Nuremberg, Germany

## INSIGHTS INTO EUROPEAN PET FOOD TRENDS AND INNOVATION



#petfoodforum • [PetfoodForumEvents.com/Europe](https://PetfoodForumEvents.com/Europe)



Co-located with

**Interzoo 2024**

# Pet Probiotics: Understanding pet parents' beliefs, motivations, purchase journey and needs

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Interact  
& ask

Slido.com  
#3739753

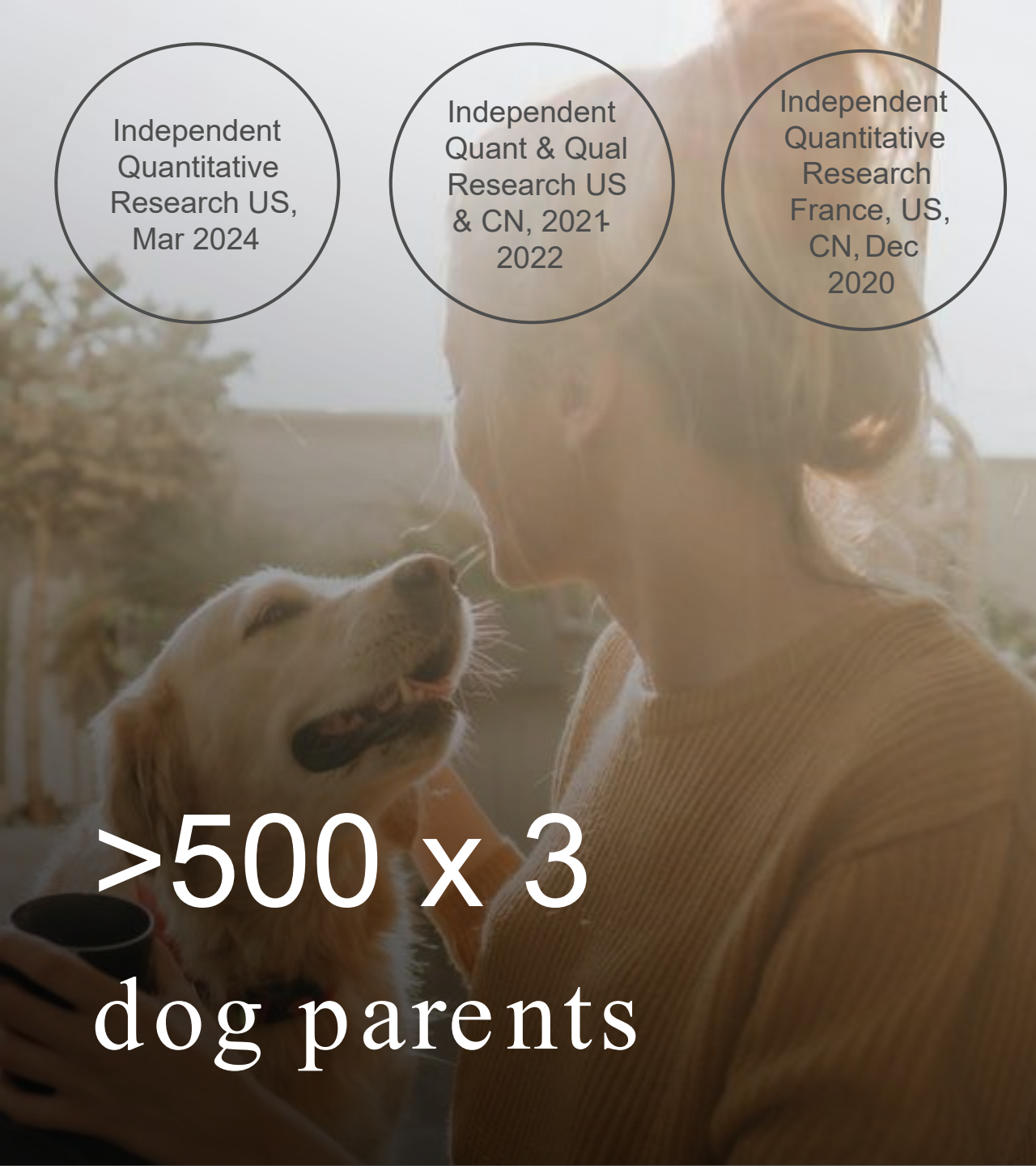
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Not intended for consumer communication. The information presented  
in this slide does not imply any claims*

People are difficult







A woman with blonde hair is smiling and holding a white dog. The background is a soft-focus outdoor scene with trees.

Independent  
Quantitative  
Research US,  
Mar 2024

Independent  
Quant & Qual  
Research US  
& CN, 2021-  
2022

Independent  
Quantitative  
Research  
France, US,  
CN, Dec  
2020

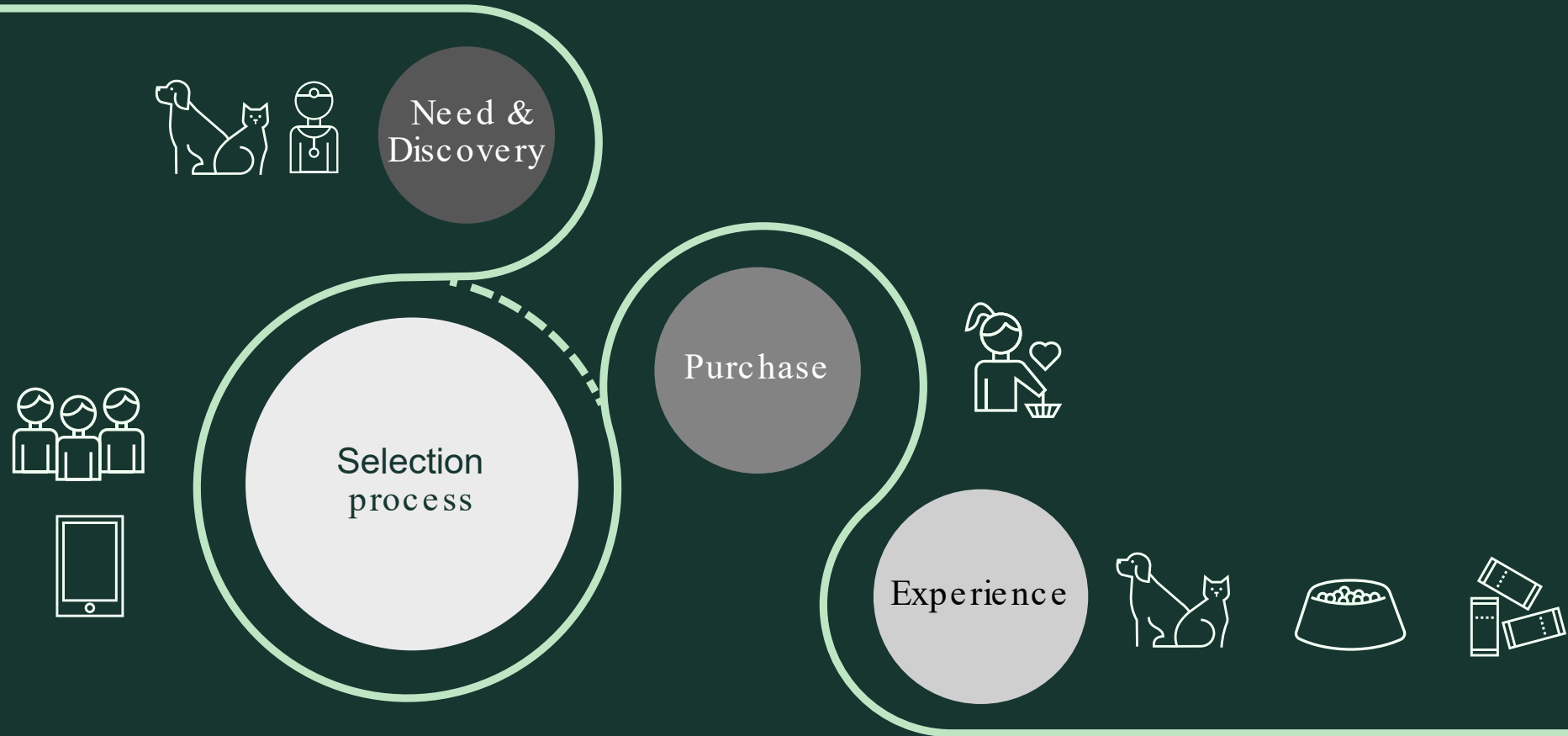
>500 x 3  
dog parents



>500 x 3  
cat parents



# Pet owners' probiotic journey



# Pet owners' probiotic journey



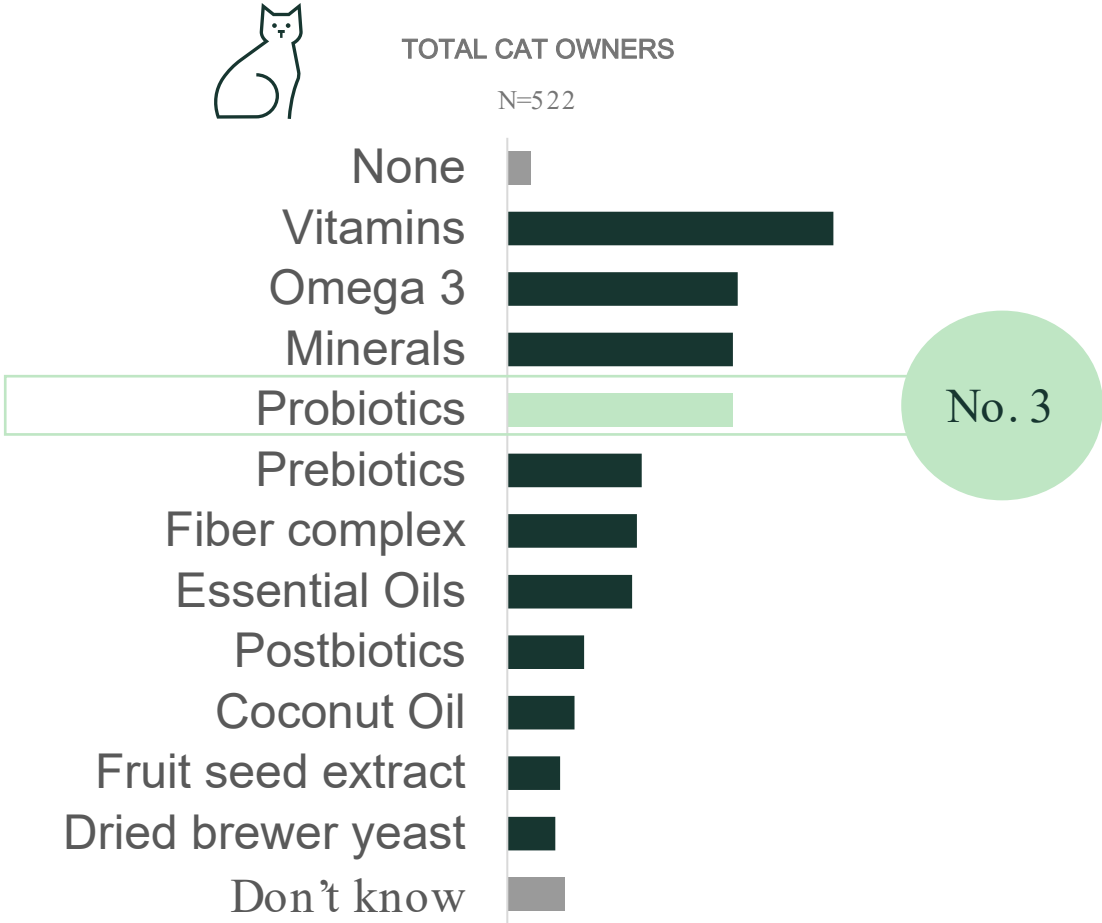
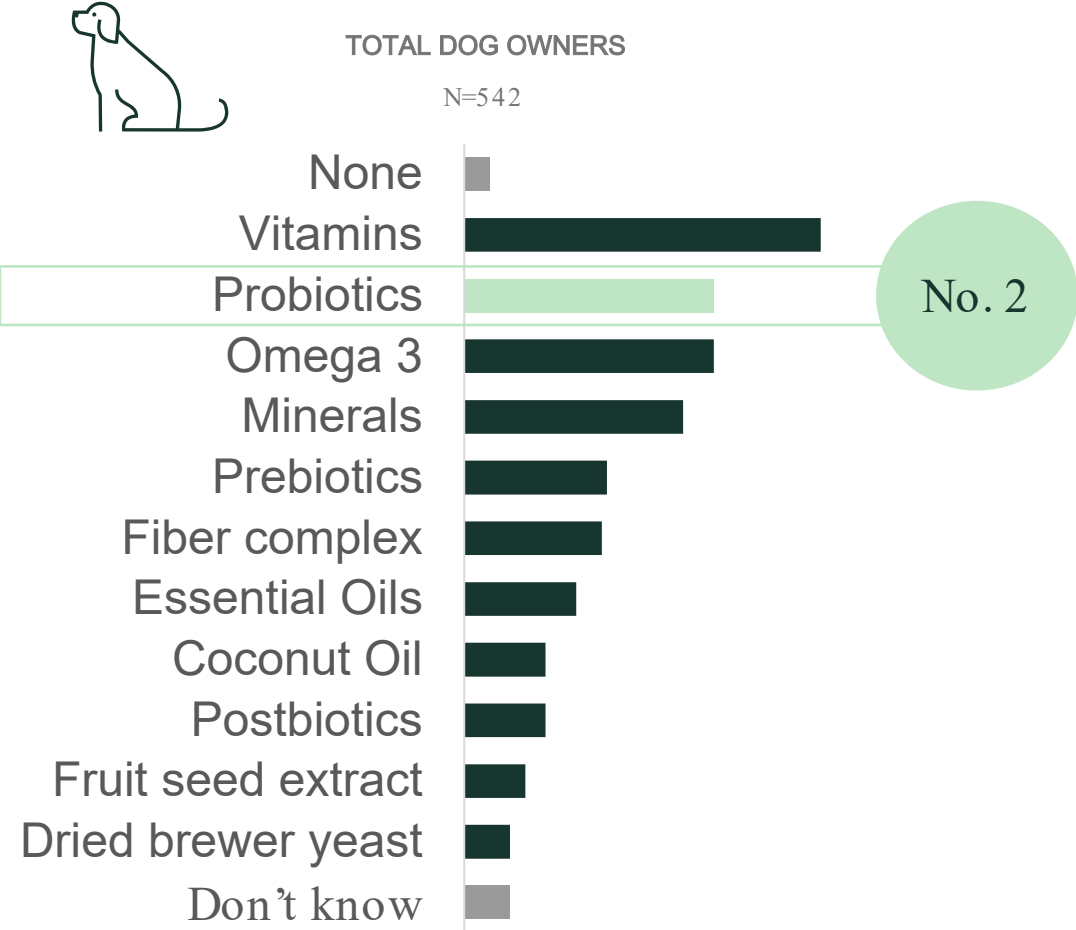
Need &  
Discovery

# probiotics

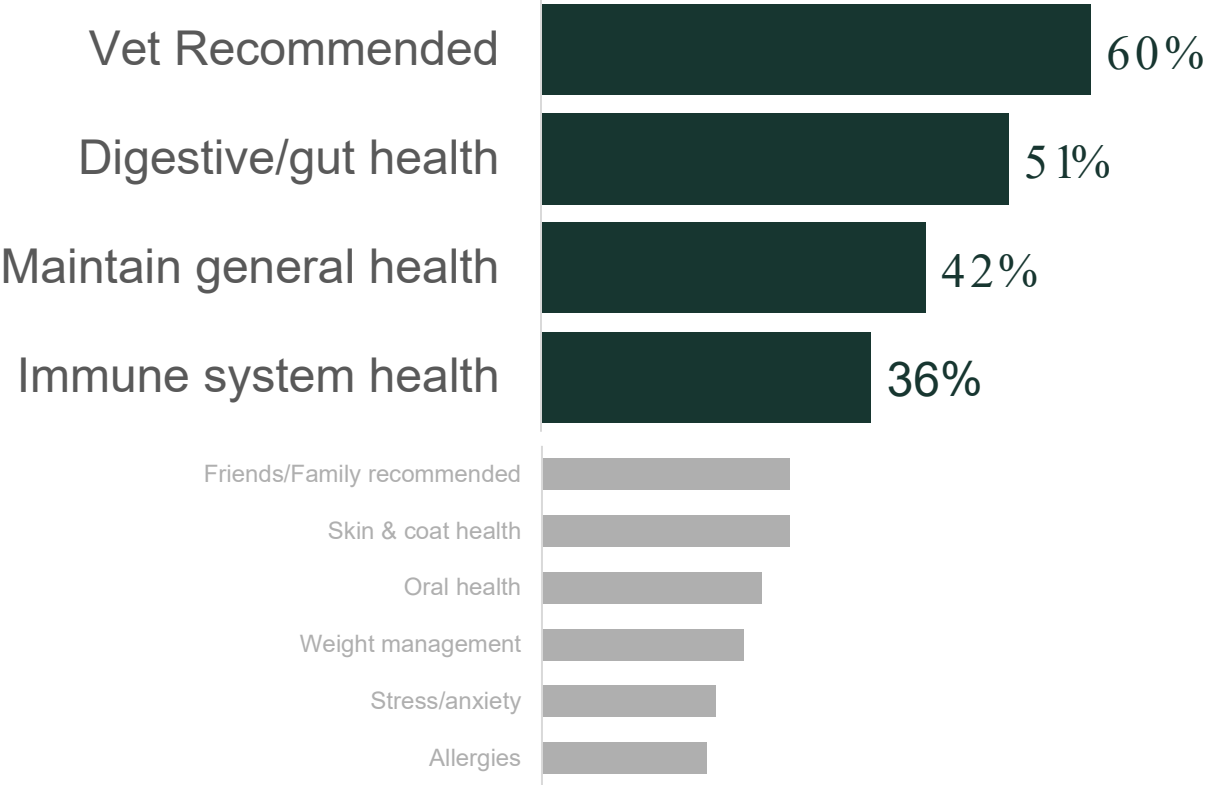
## 58% familiar



# Probiotics take a strong spot in functional ingredients list



# Veterinarians remain the main trigger, followed by digestive health benefit

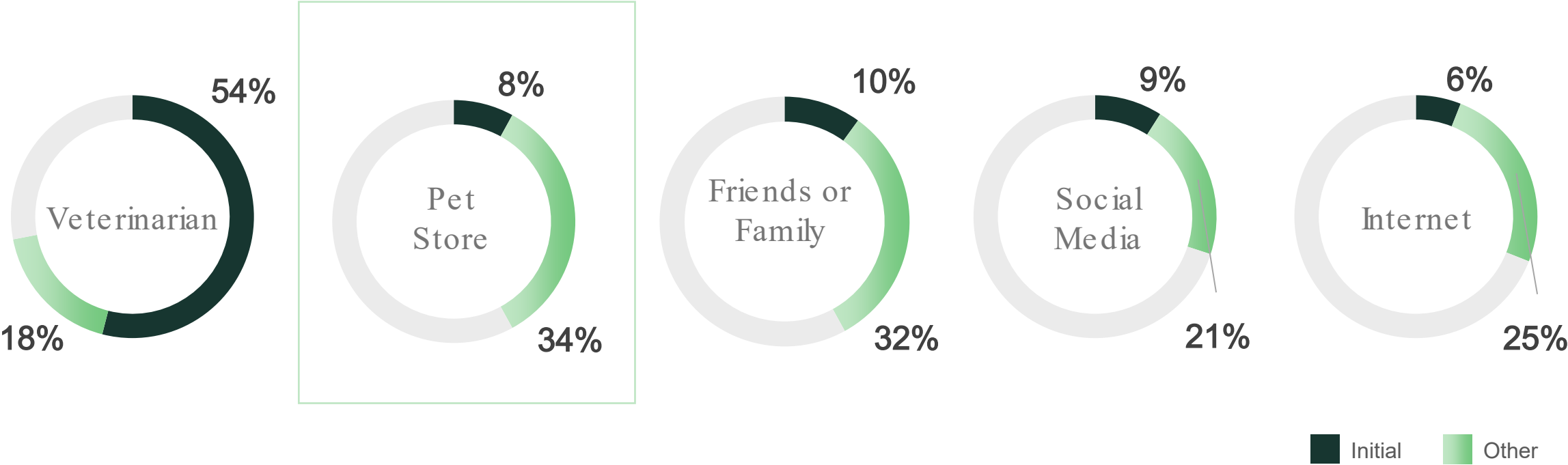


# Pet owners' probiotic journey





Pet store personal plays an important role after initial recommendation is made, and likely influence a specific choice of a product





## General preferences that might influence the selection process

**'Vet Reco' &  
'Clinically -  
tested'  
remain  
influential**

**60 %**

Prefer softer claims  
(helps support a  
normal digestion)

**57%**

Prefer probiotics  
that contain strains  
originated from dog  
or cat



Go beyond the “with probiotics” statements

With  
Advanced  
Probiotics

With  
Complete  
Probiotics

With  
Feline/K9  
Specific  
Probiotics



## Colony Forming Units (CFU)

7 in 10

State CFUs are important

1 in 3

Wants it on the front prominently

NO PREFERENCE FOR  
EXACT AMMOUNT

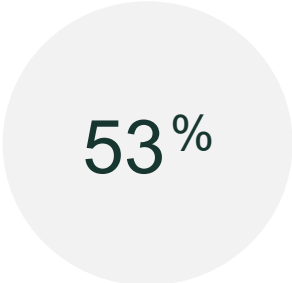
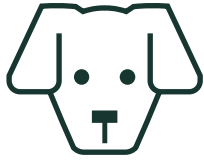
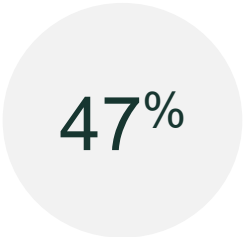
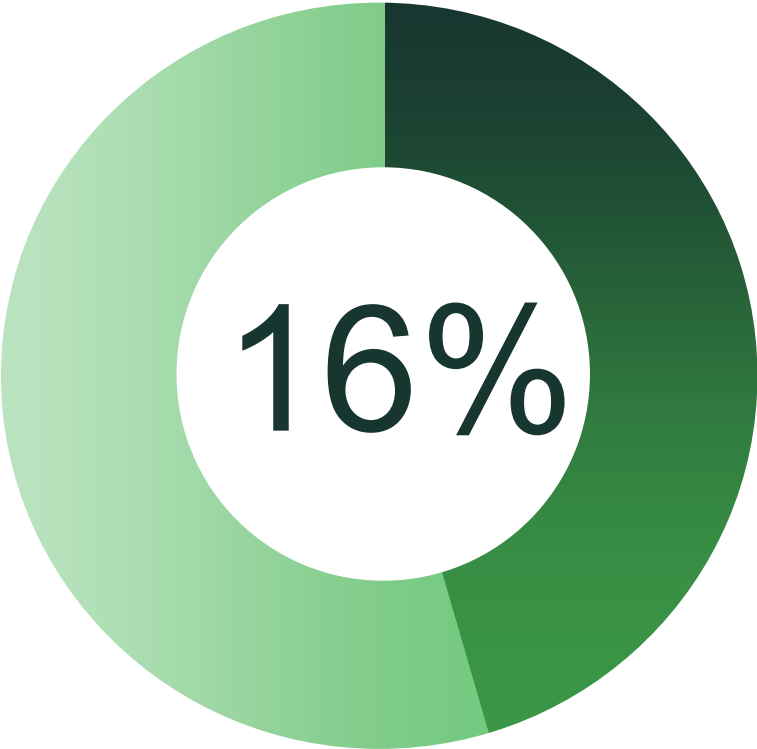
unless you mention “daily dose recommended”



# Pet owners' probiotic journey

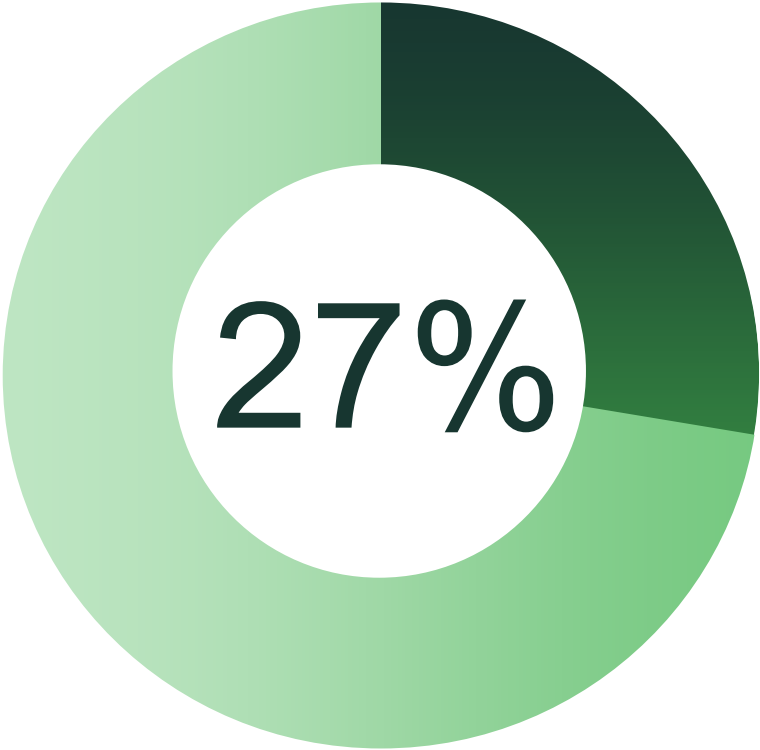


# Significantly fewer pet owners giving probiotics in France (2020)

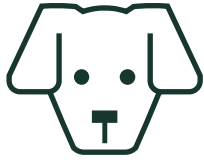




# % of Pet Probiotics users in 2021



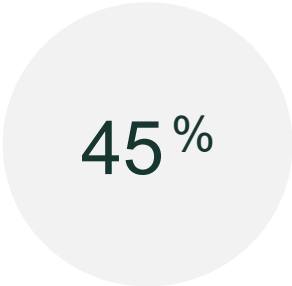
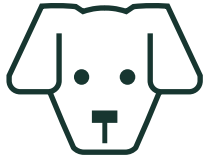
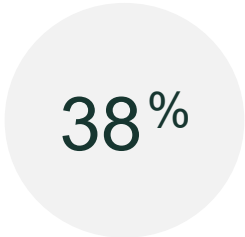
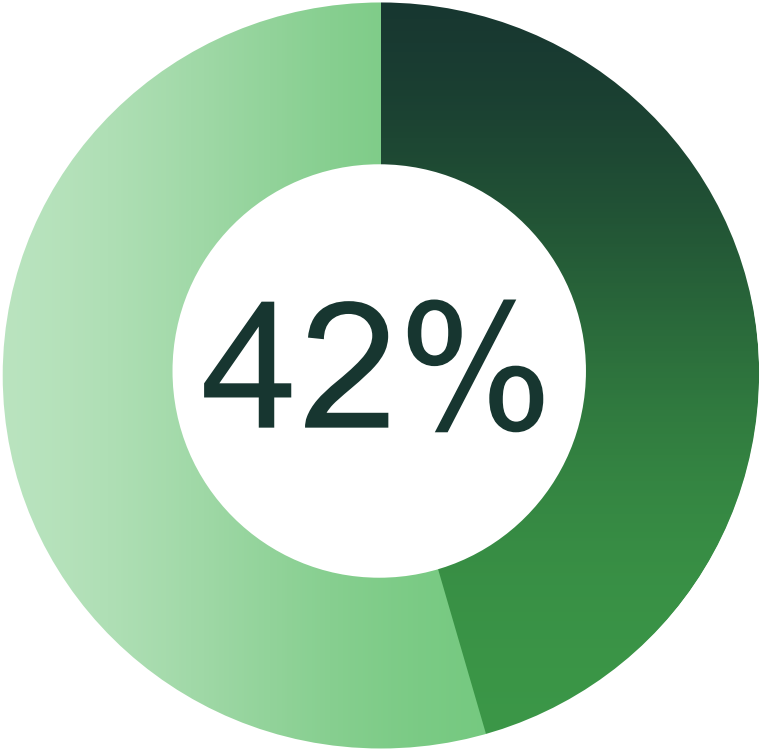
22%



32%



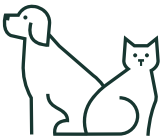
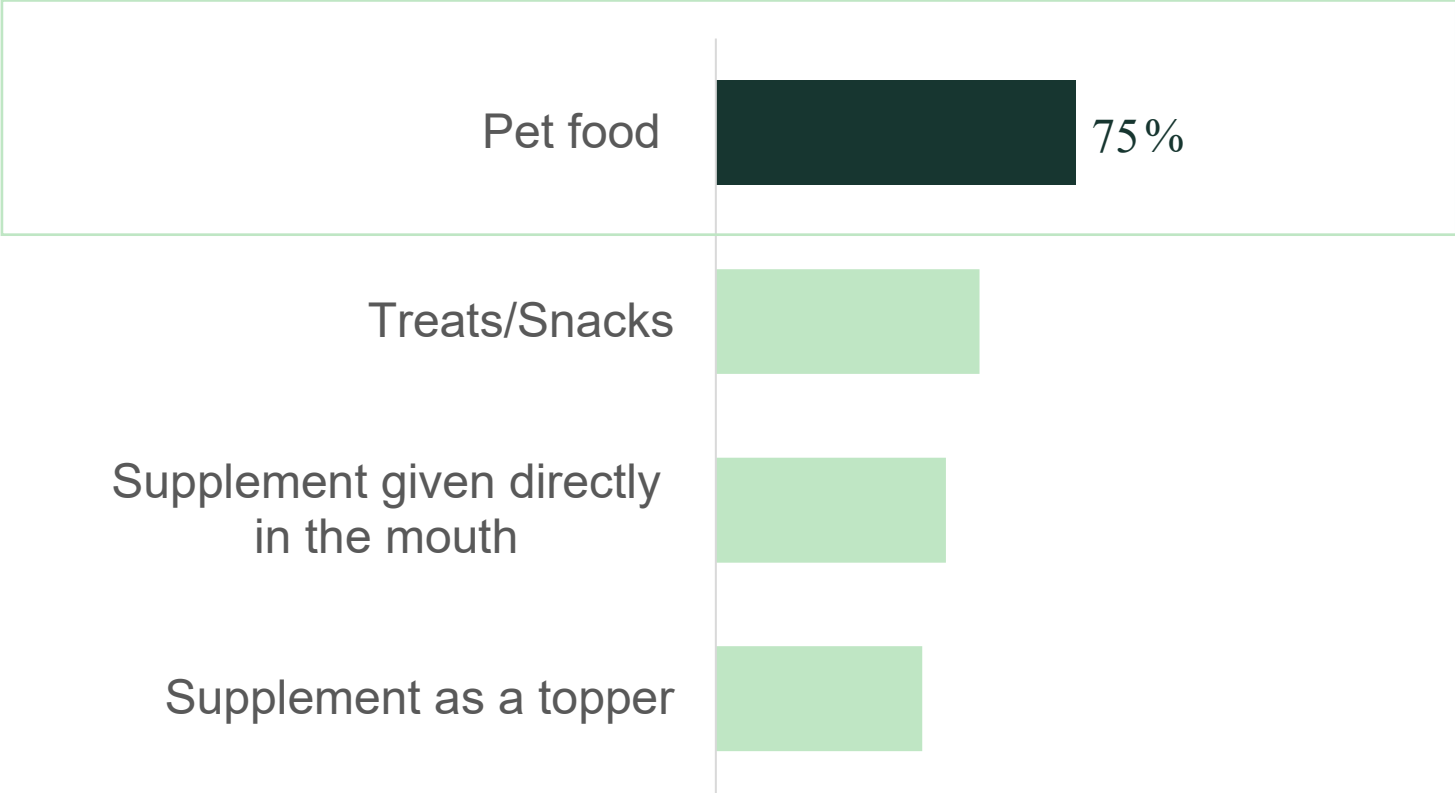
# % of Pet Probiotics users in 2024



Users tend to be younger and more invested in pet health



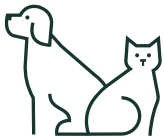
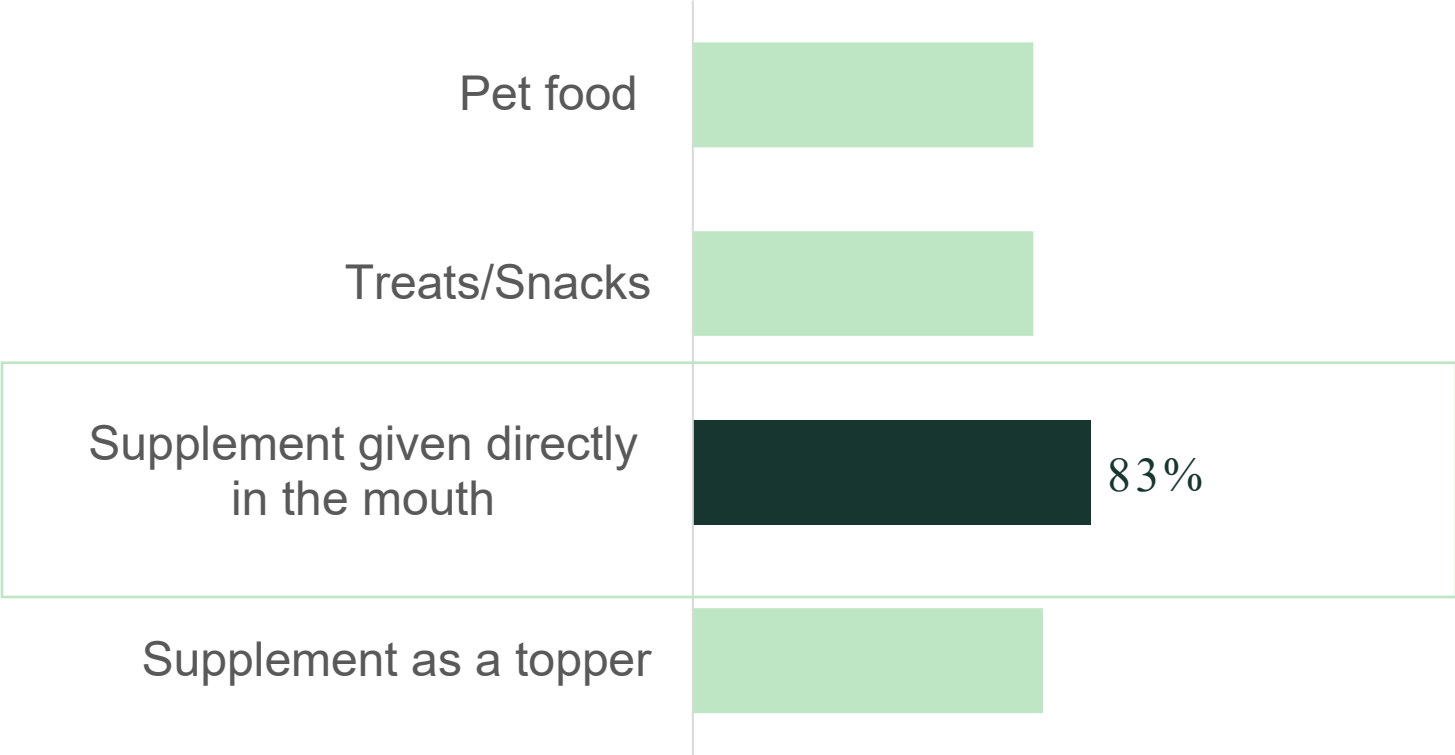
# The main form of probiotic used among cats and dogs in the US



TOTAL USERS  
N=611

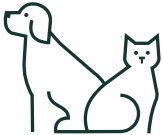
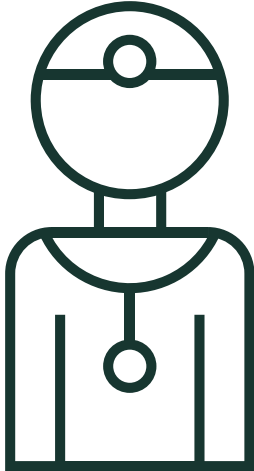


# In France, the story is different



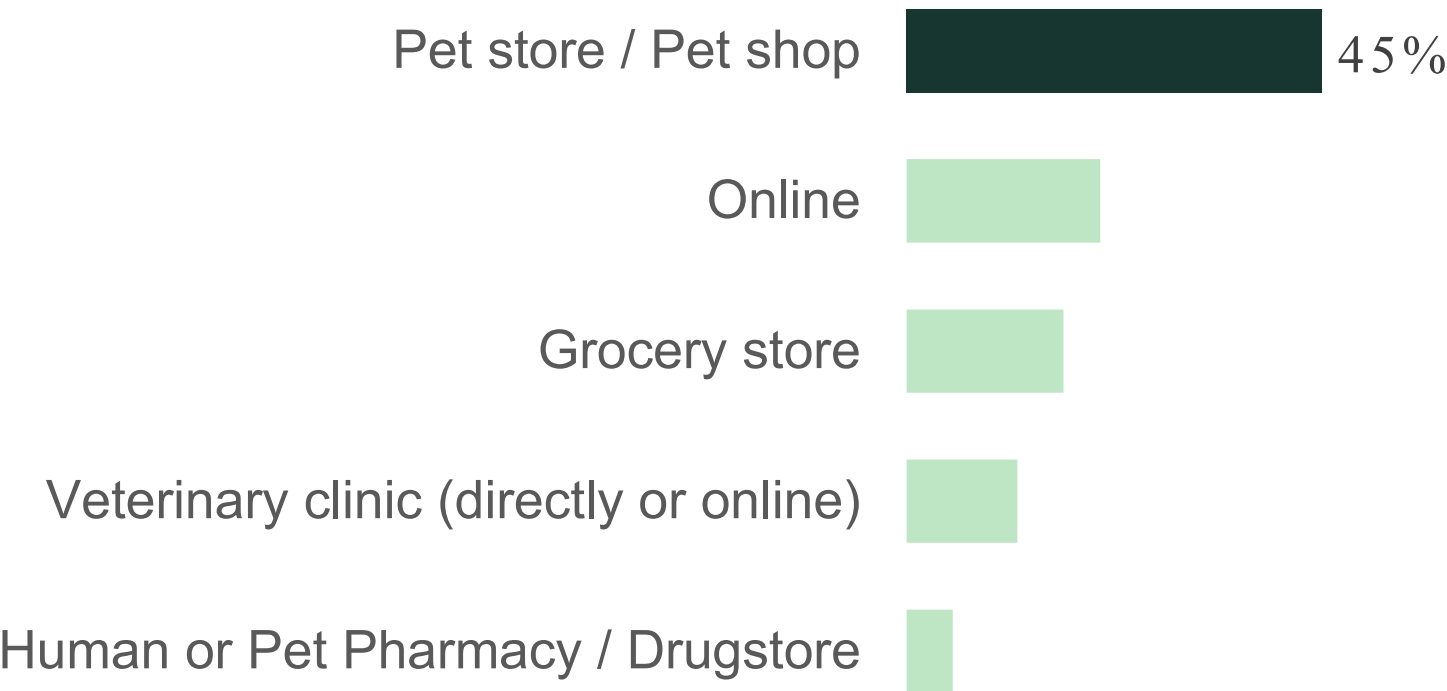
TOTAL USERS  
N=163

# Vet recommendation is the main driver of probiotic choice across both dog and cat owners

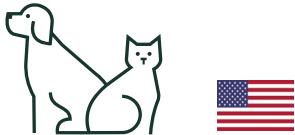




# Pet stores are the main channel for sourcing pet food containing probiotics, especially among cat owners

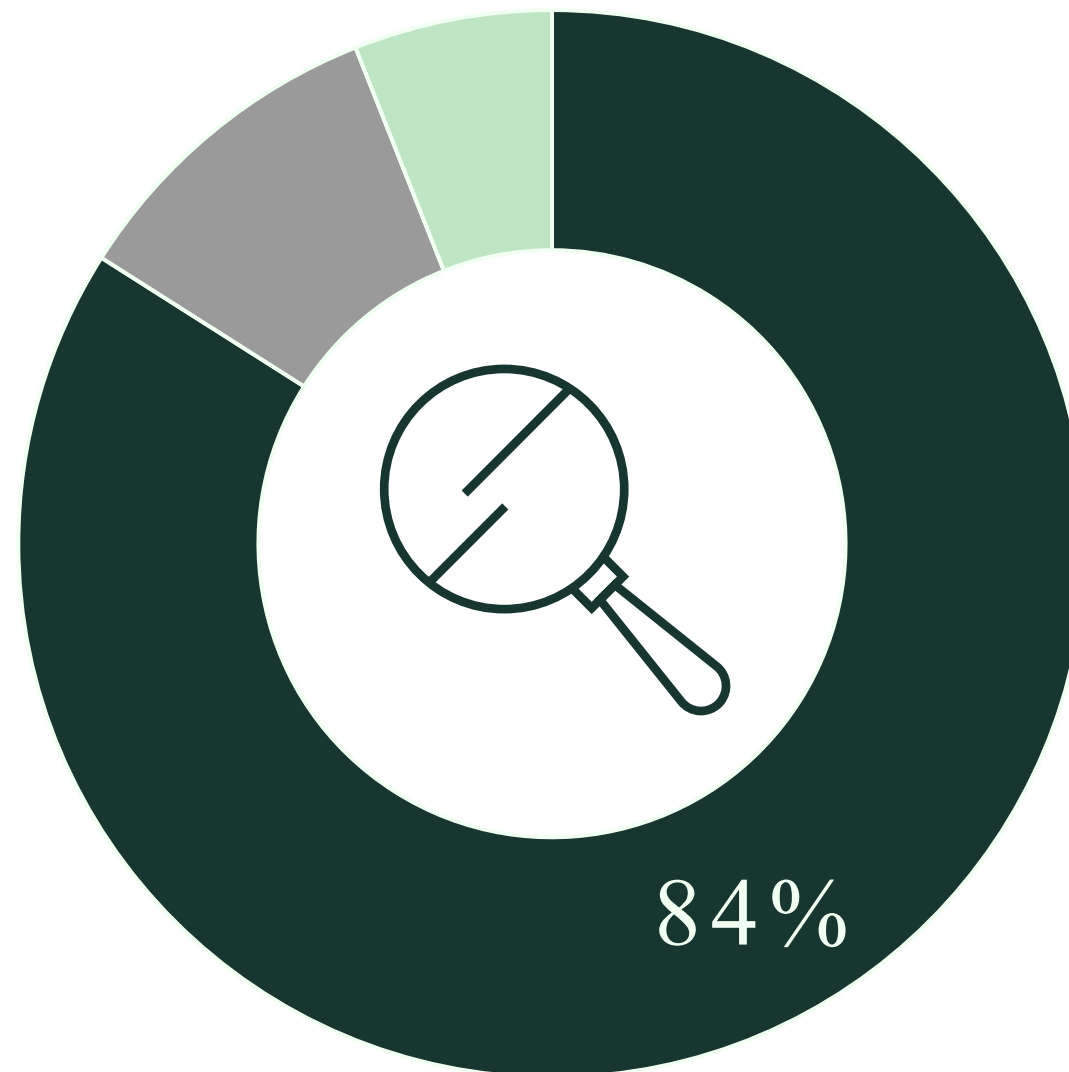


In France, Vet Clinics are the primary purchase channel



# 8 in 10 owners actively look for pet food with probiotics

- Actively looking
- Chose by Chance
- Initial by Chance- but repurchase the same



Can presence of probiotics be a motivator to switch brands?

31%  
of pet owners will  
switch brands

12% will not switch for any reason

Base all respondents

Q6a. Thinking about the brands of pet food, treats or supplements you currently use for your pet, besides price what elements would motivate you to switch brands? MULTI CODE



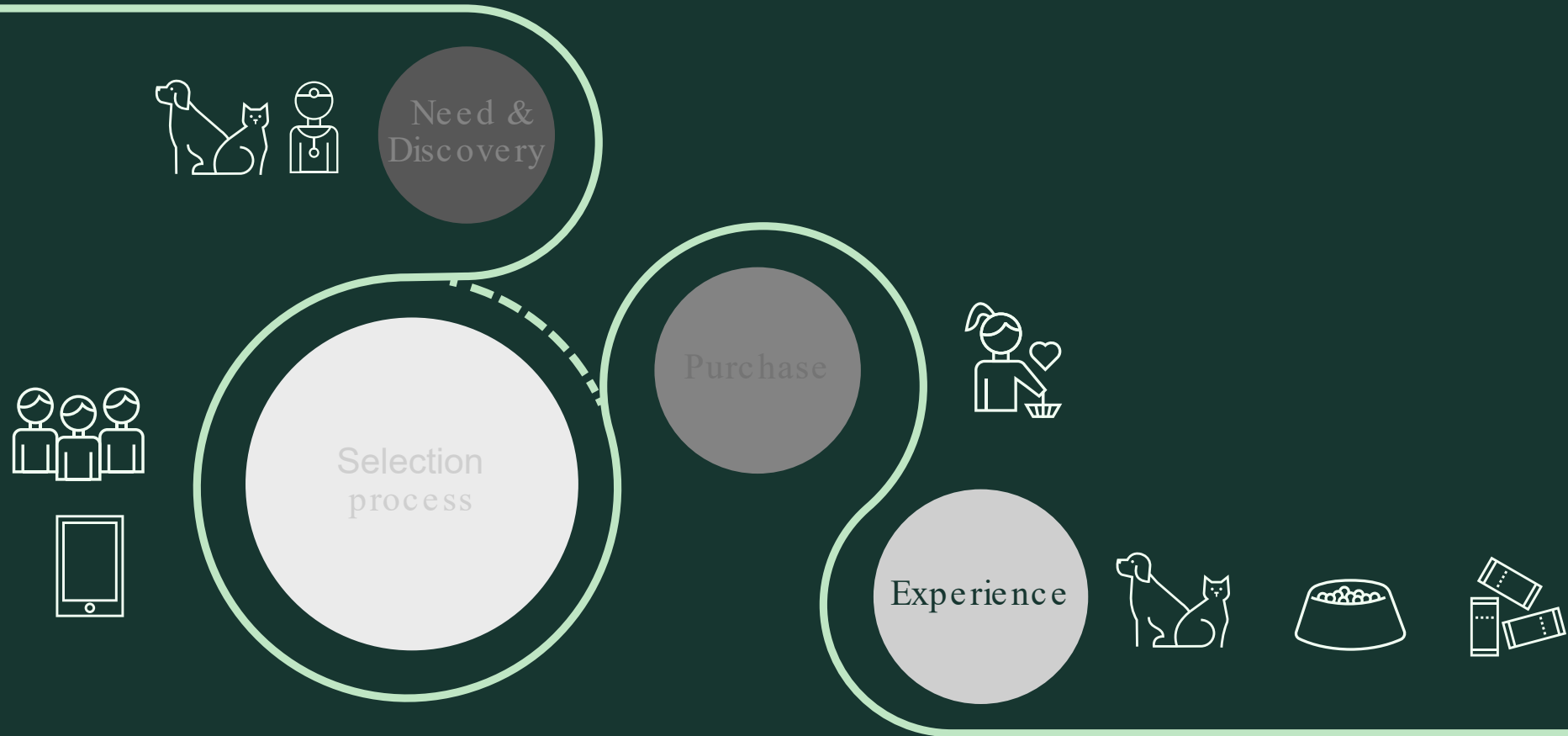


87%  
willing to pay  
1-5% premium  
for pet probiotics

US QUANT 2024. Base user respondents who CURRENTLY DO NOT USE PROBIOTIC but are WILLING TO USE PROBIOTIC PET FOOD  
SCORING 78-9 OR 10 for LIKELIHOOD TO USE in the FUTURE, n=354 (dog & cat owners)  
Q39. Would you be willing to pay....

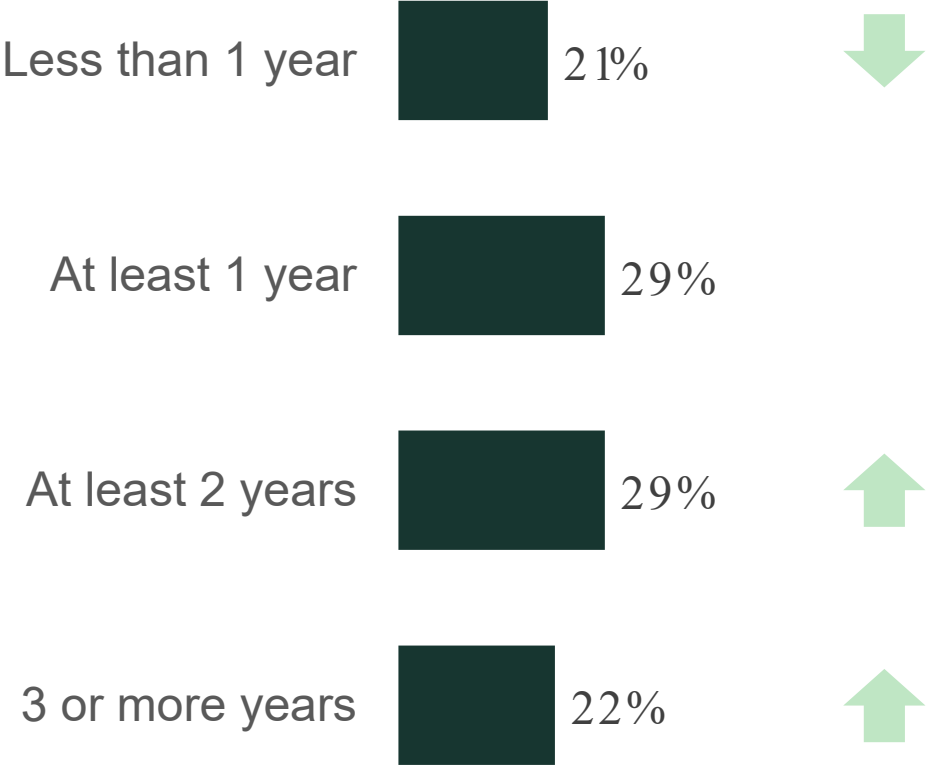


# Pet owners' probiotic journey

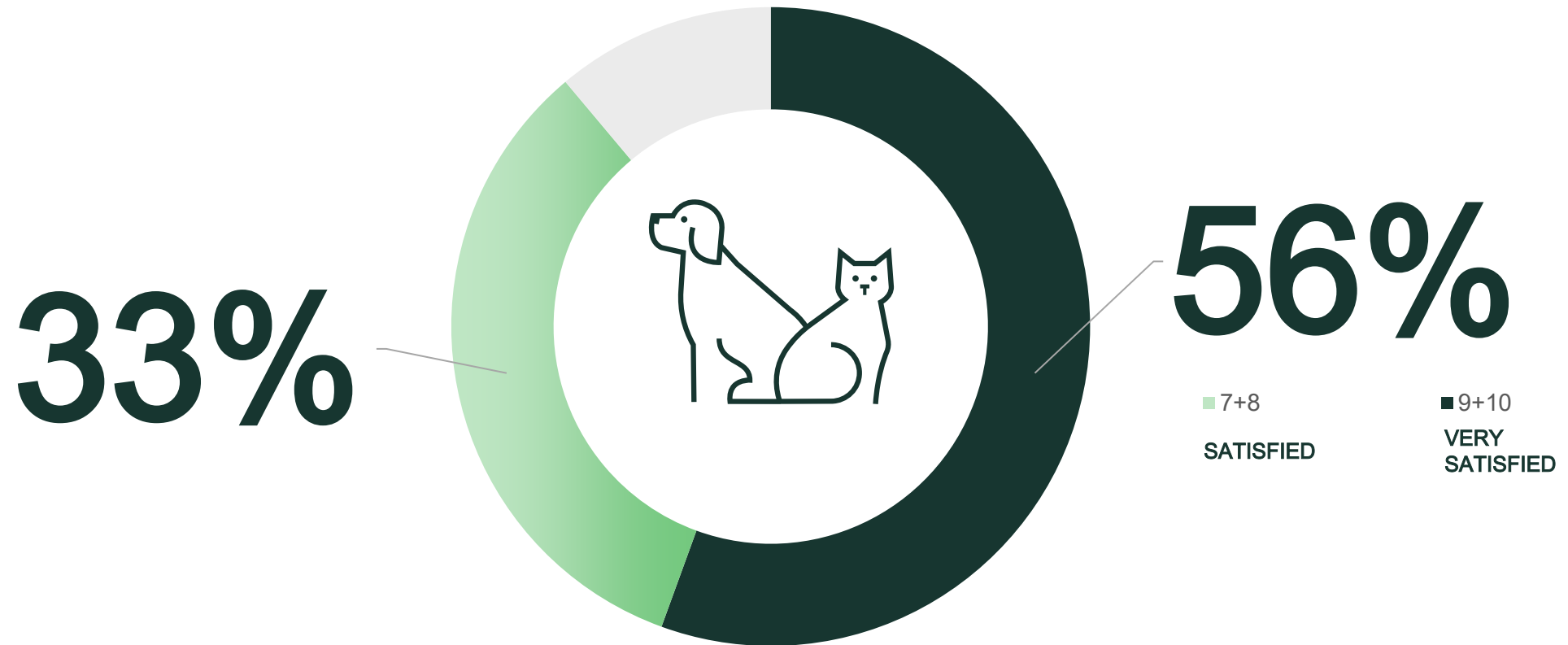




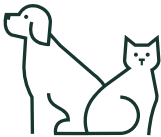
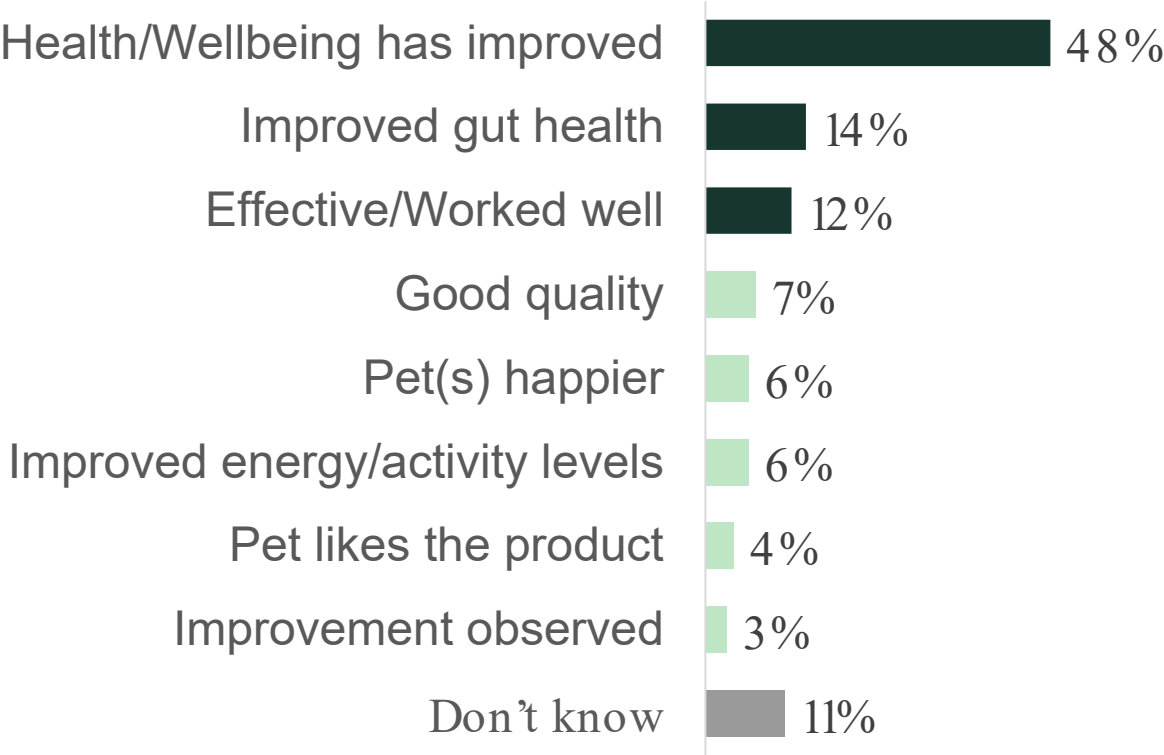
# Most pets have been receiving probiotics for at least 1-2 years



1 in 2 pet parents are very satisfied with the pet probiotics



# Actual or perceived improvement is the main driver of high satisfaction



A group of diverse people in a modern office setting, smiling and engaged in conversation. The background shows a brick wall and other people working.

2 in 3 users  
are *very likely* to  
recommend  
pet probiotics

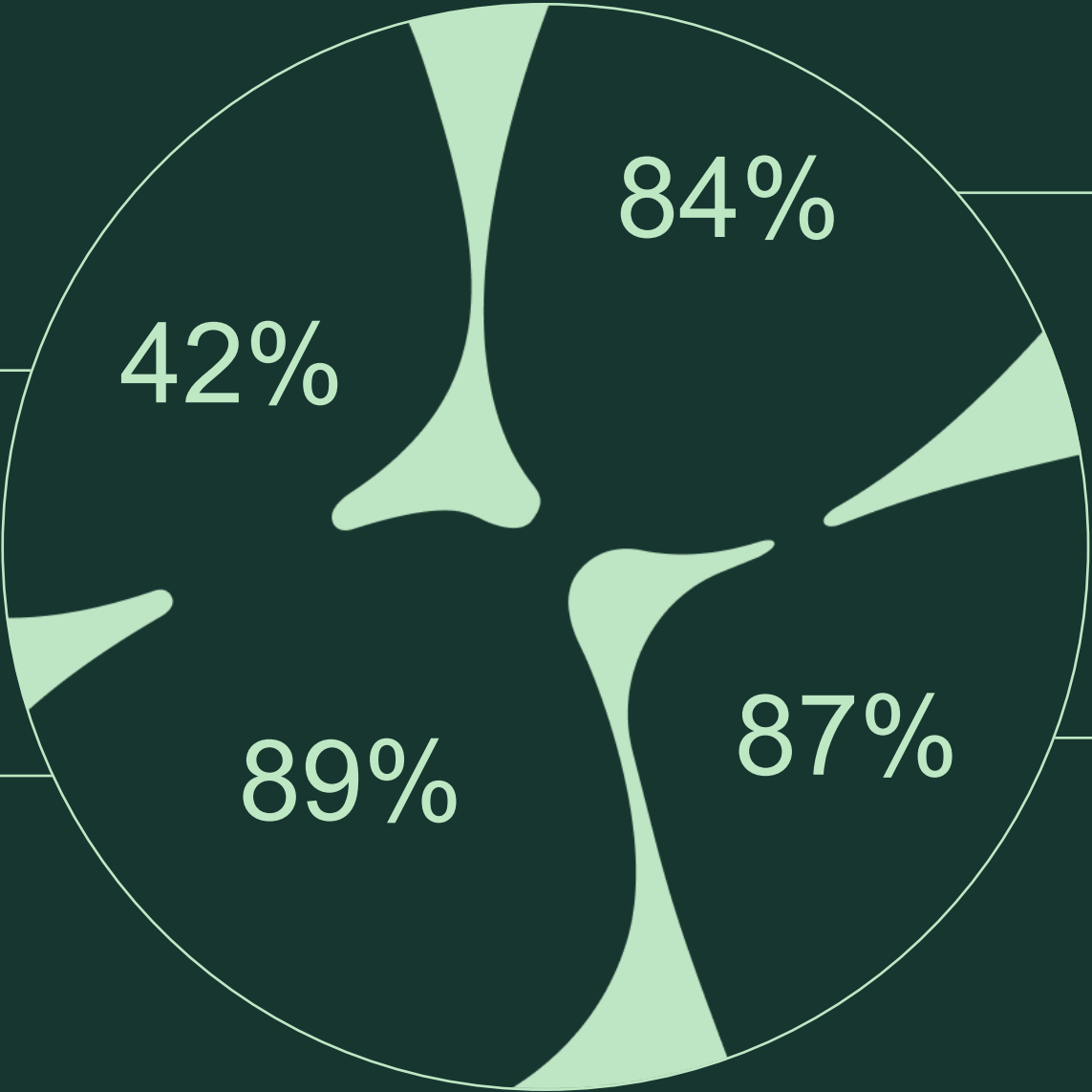




# In Summary

Pet parents use probiotic products to proactively address their pets needs across life-stages

Pet parents are satisfied with pet probiotics, driven by the results they see



Actively seek pet food with probiotic claims.

Soft claims are better received.

Non-users are willing to pay 1-5% premium for probiotic products



The background is a dark, moody photograph of various mushrooms. Several cross-sections of mushrooms are visible, showing intricate, web-like internal structures. A single, smooth mushroom cap is positioned towards the upper right. The overall aesthetic is natural and organic, with a focus on the textures and patterns of the fungi.

# proactive health





well-being



The background of the image is a soft-focus bokeh effect. It features large, out-of-focus circles in shades of light green, lime green, and pale yellow, set against a darker, muted green background. The overall effect is ethereal and organic, resembling sunlight filtering through leaves or a microscopic view of cells.

education


The opportunity is yours





42%  
Happy users

58%  
Non-Users

## What will you do next?

**46%**   
**very likely** to  
purchase food with  
probiotics (35% likely)

**51%**   
**very likely** to  
purchase treats with  
probiotics (39% likely)

**44%**   
**very likely** to  
purchase supplements  
(31% likely)

US QUANT 2024. US Base user respondents that DO NOT use pet foods /treats or supplements containing probiotics  
Q28. How likely would you be to purchase pet food /treats or supplements containing probiotics for your dogs/cats?  
7+8 = 'Likely', 9+10 means "Very likely".





# Lidiia Alaverdova DVM



Contact me 😊

