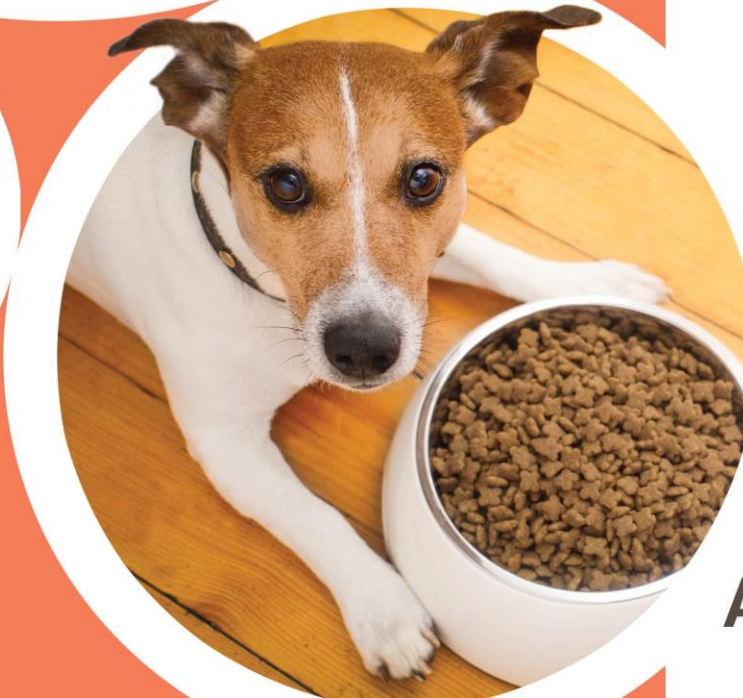


PETFOOD FORUM

Where the GLOBAL PET FOOD
INDUSTRY does business

Health & Wellness Trends in Pet Food

Shannon Landry



#petfoodforum

April 28-30, 2025, Kansas City, Missouri, USA



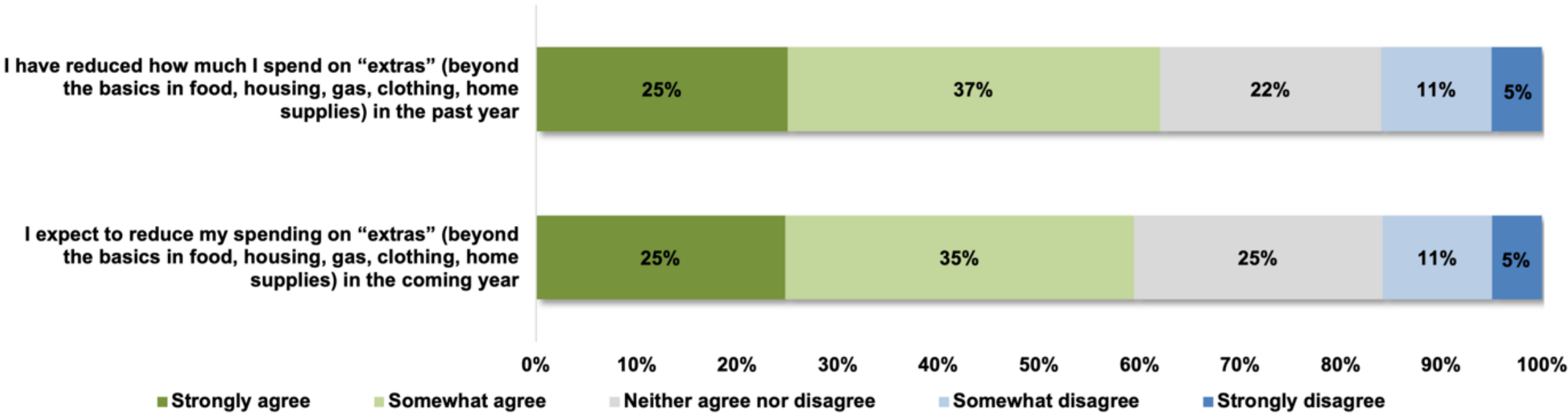
Agenda

- **Impact of current economic environment on pet food spending**
- **Importance of health & wellness in the pet food market**
- **Condition-specific formulations**
- **Science-based and veterinary formulations**
- **Limited ingredient formulations**

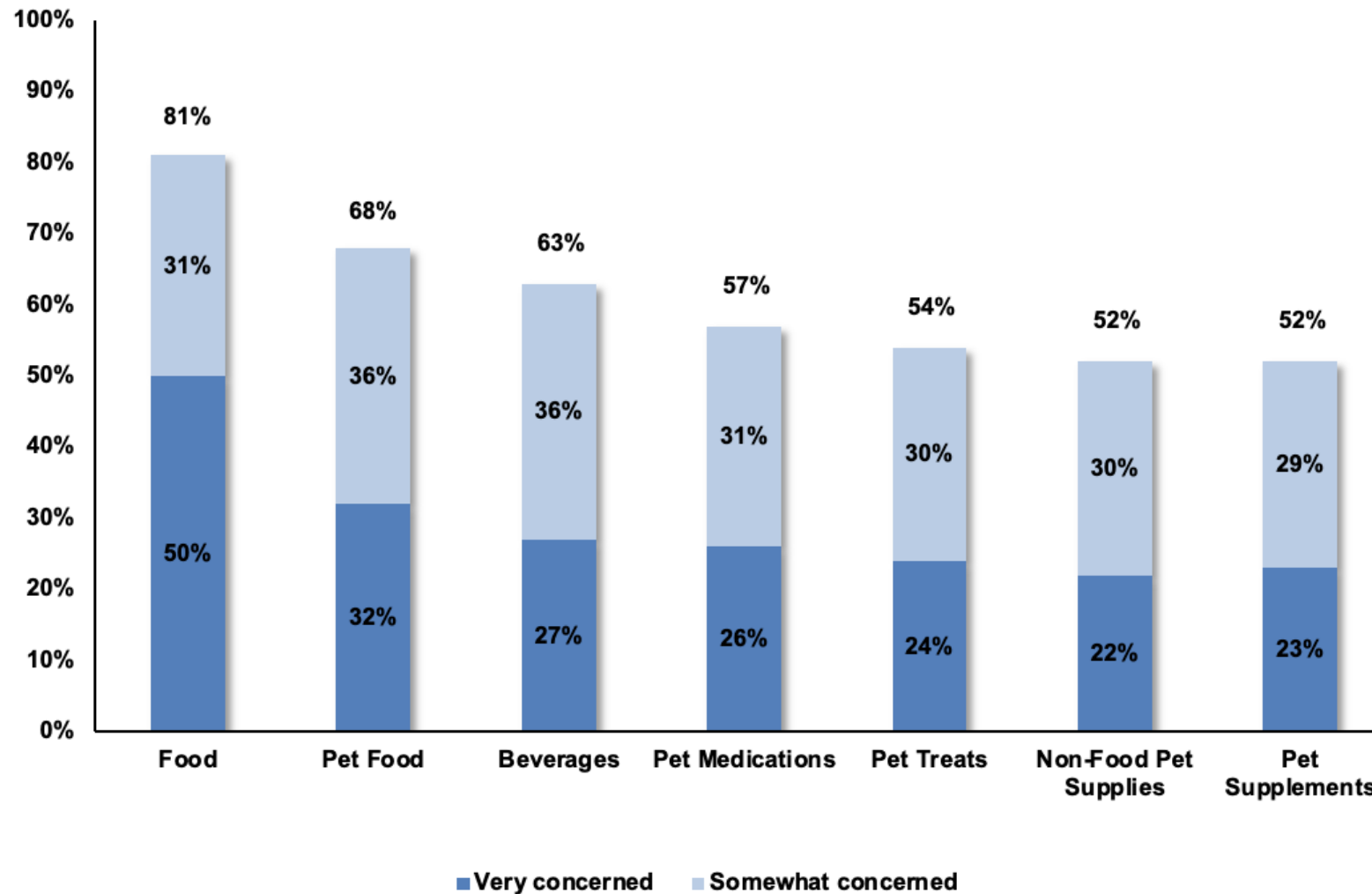
Impact of Current Economic Environment

- **Negative economic impacts on pet owners**
- **Concern about rising prices**
- **Pet owner pain points**
- **Economic impact on product choice**

Negative Economic Impacts on Pet Owners



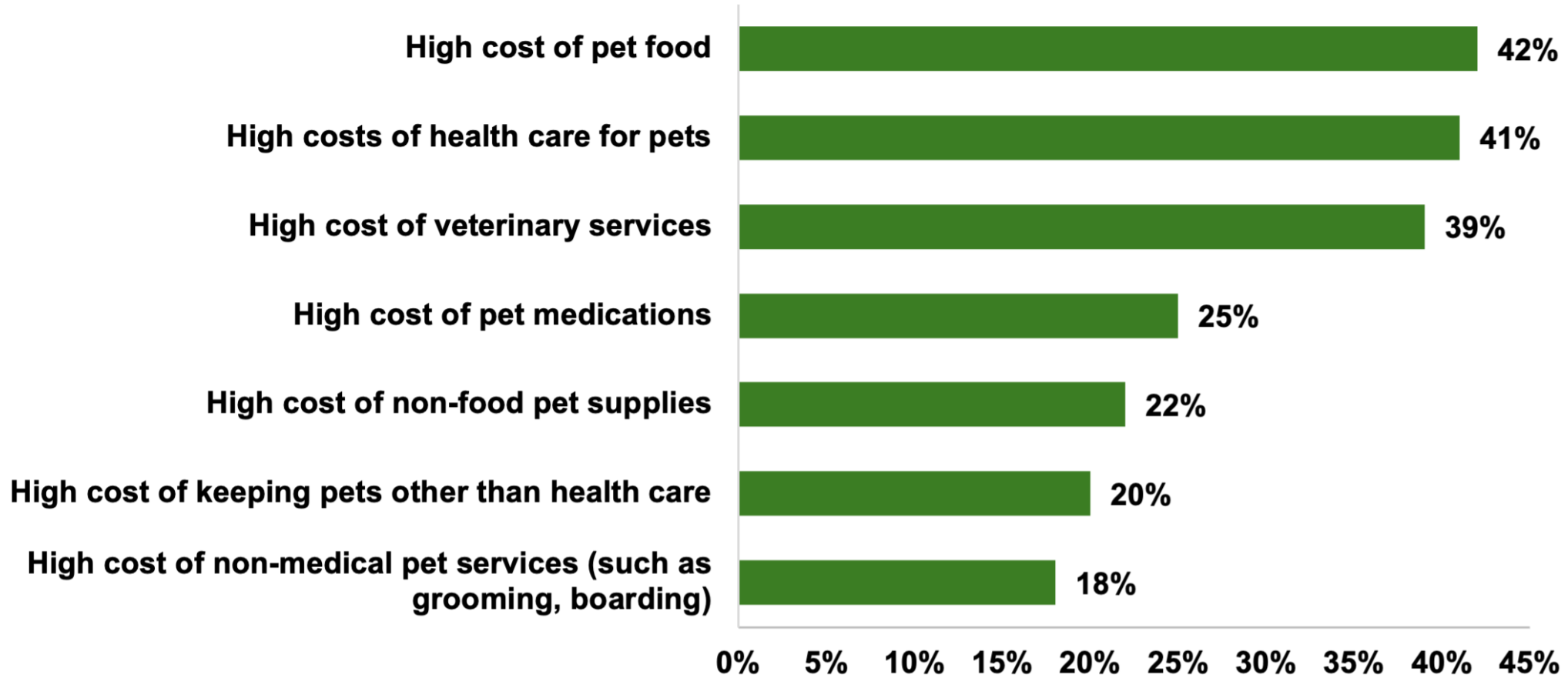
Concern About Rising Prices



Source: Packaged Facts November 2024 Survey of Pet Owners

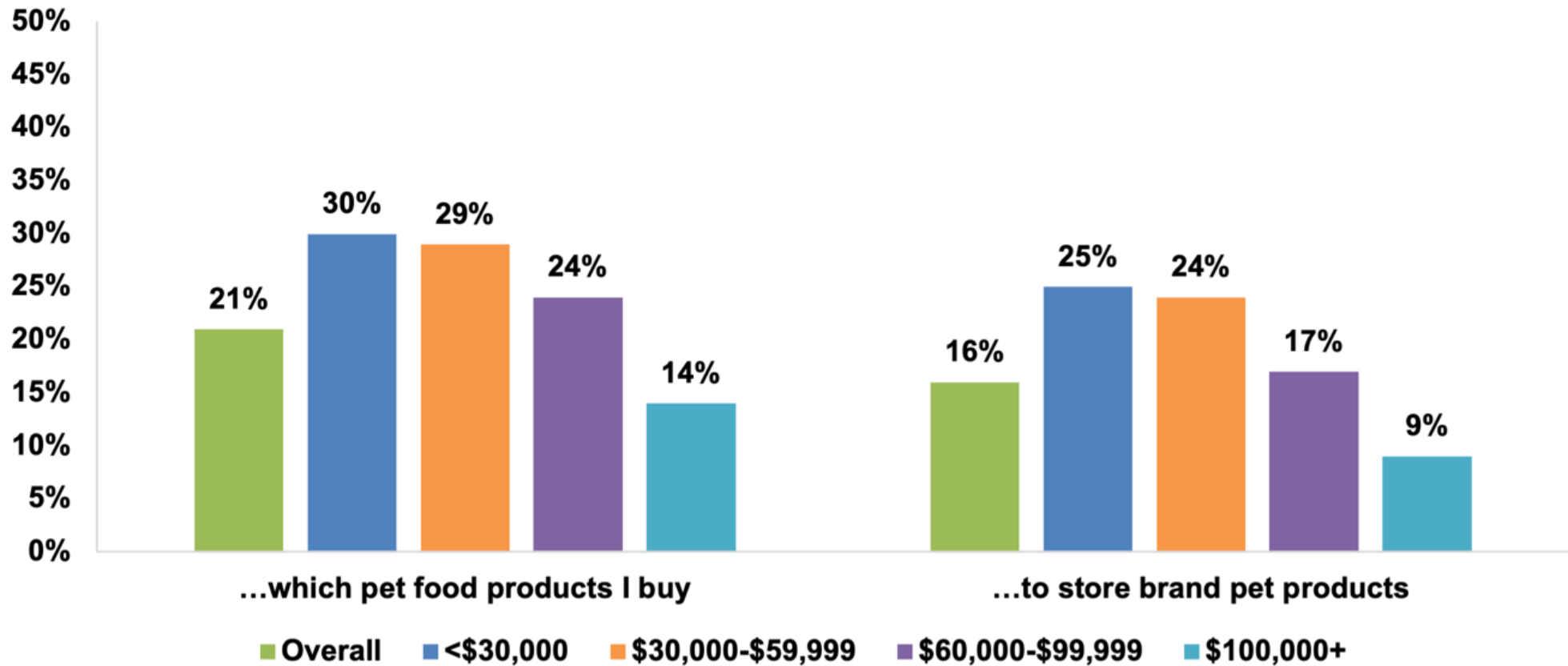
Pet Owner Pain Points

“In the past 12 months, I have been challenged by...”



Economic Impact on Product Choice

“Due to high prices/inflation, I have switched...”



Importance of Health & Wellness in Pet Food

- **Health and wellness priorities**
- **Petfood's role in healthcare**
- **Top pet health & wellness categories**
- **Petfood's health positioning**

The Health Connection



87%

Mental Health Benefits

Pets provide emotional support, reduce stress, and combat loneliness.

77%

Physical Health Benefits

Pet ownership encourages activity, routine, and outdoor engagement.

59%

Pets Come First

Owners will cut back on personal spending to make sure their pet is healthy.

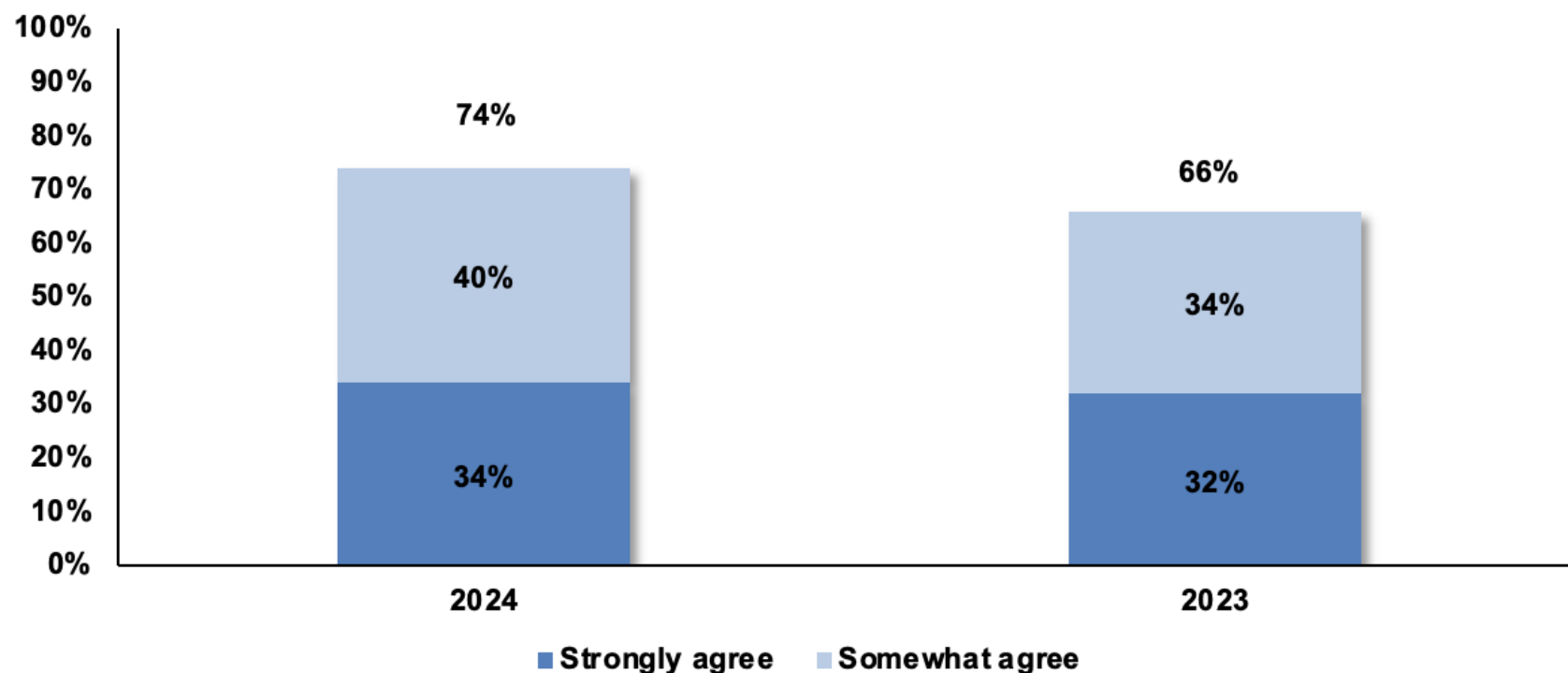
Health & Wellness Priorities



Health Improvement

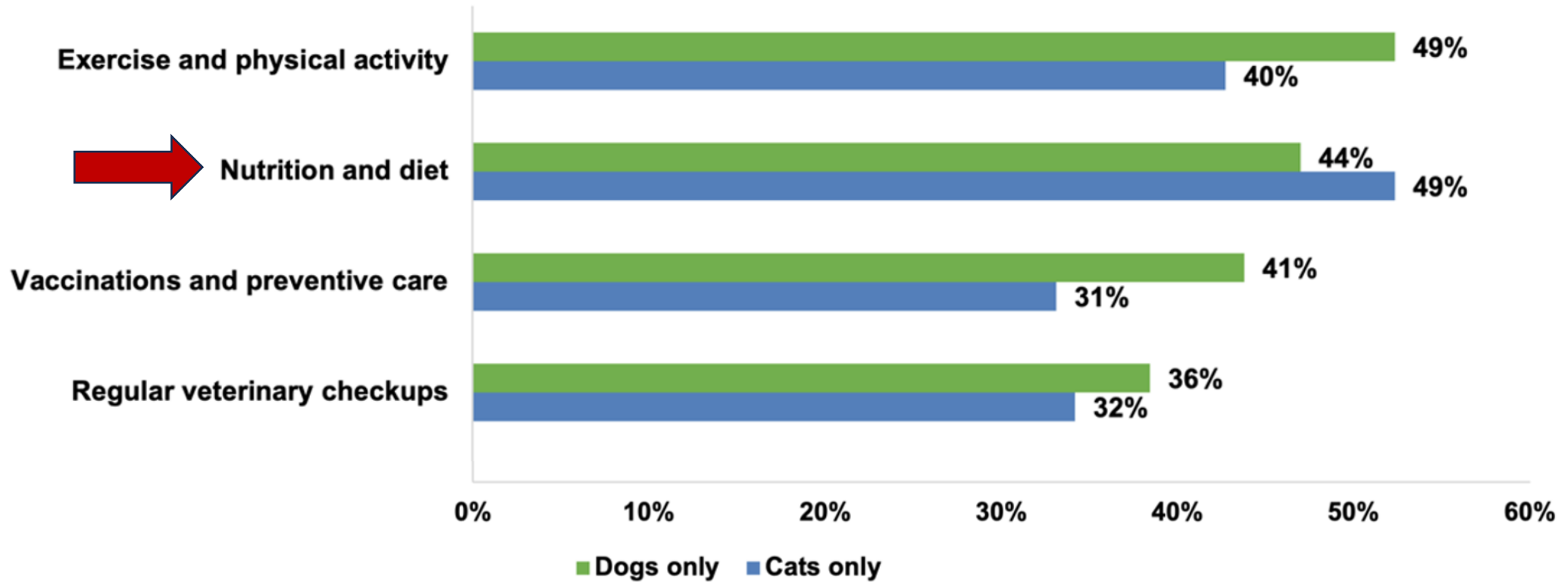
76% of pet owners look for products to improve their pets' health and wellness

Share of Pet Owners Willing to Spend More on Pet Foods with Health & Wellness Benefits

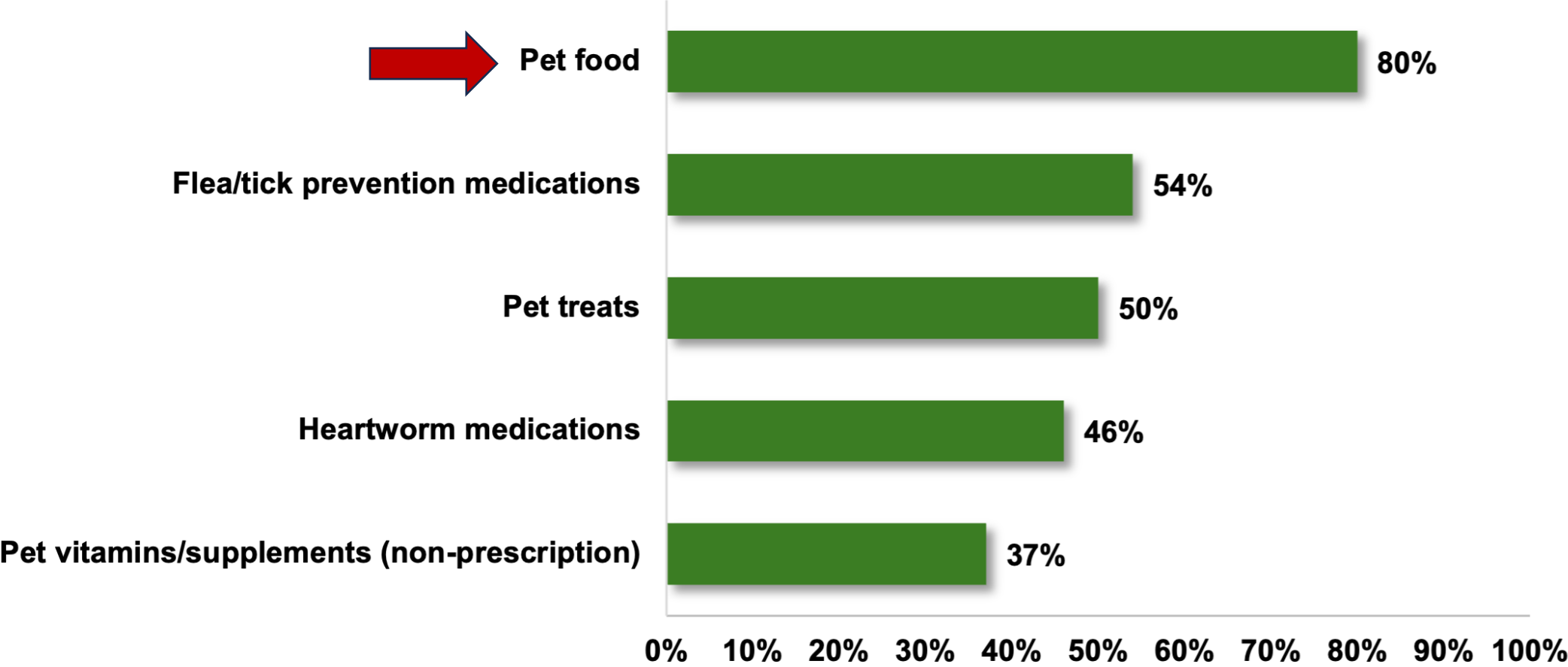


Pet Food's Role in Healthcare

Top Pet Owner Health and Wellness Concerns



Top Pet Health & Wellness Categories



Pet Food's Health Positioning

- *Most pet foods position around health & wellness in some way*
- *Even value brands tout health claims*

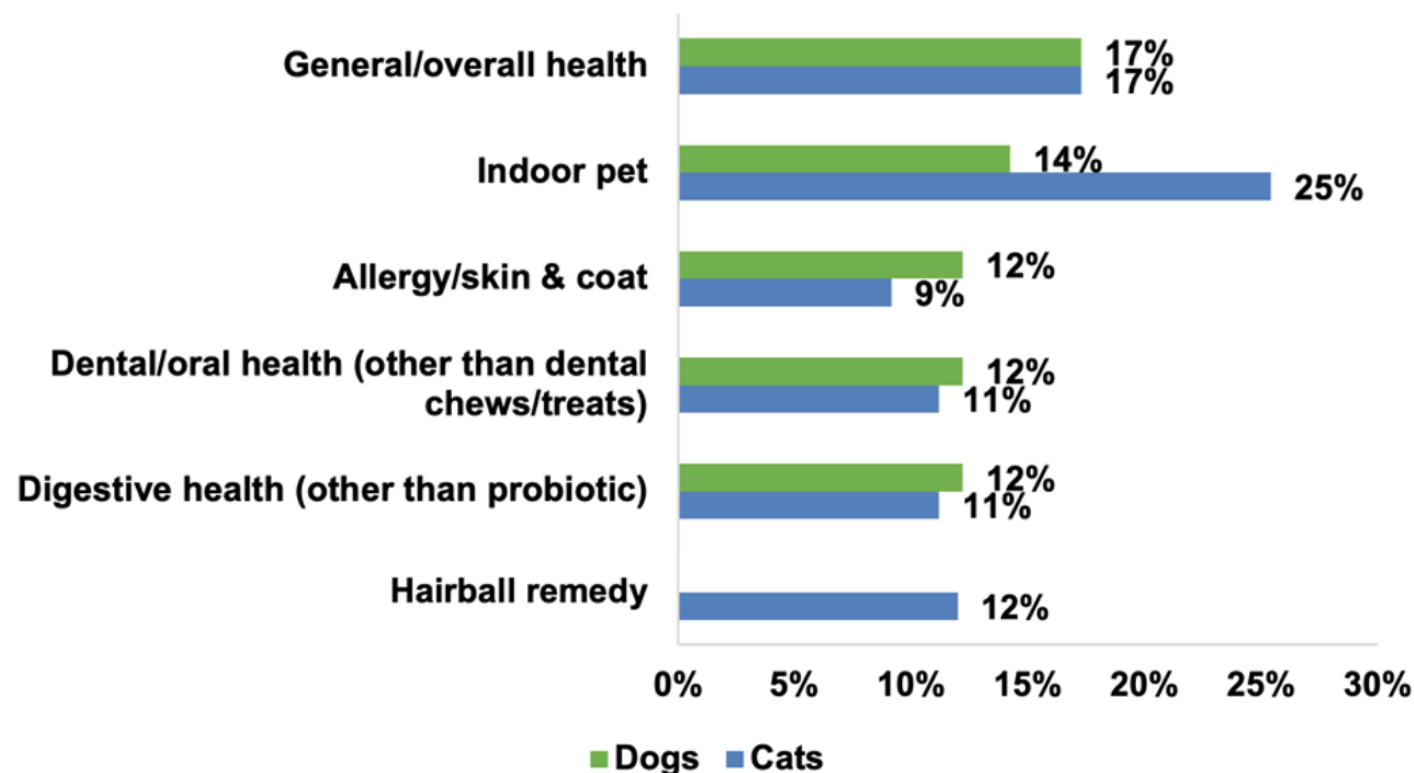


Other Factors

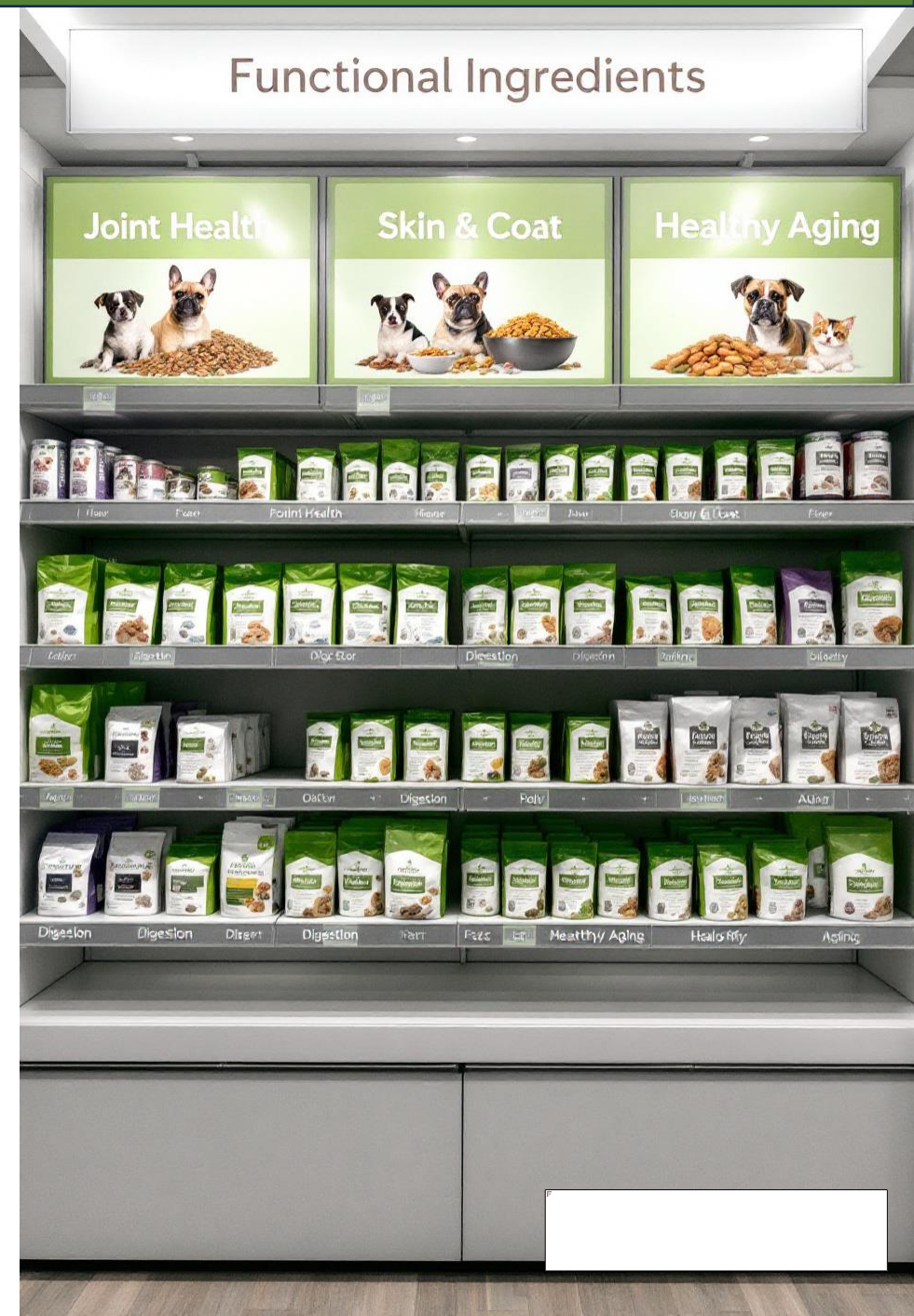
- **Condition-specific formulations**
- **Science-based and veterinary formulations**
- **Limited ingredient formulations**

Condition-Specific Formulations

*Top Condition-Specific Pet Foods
Among Functional Pet Food Purchasers*

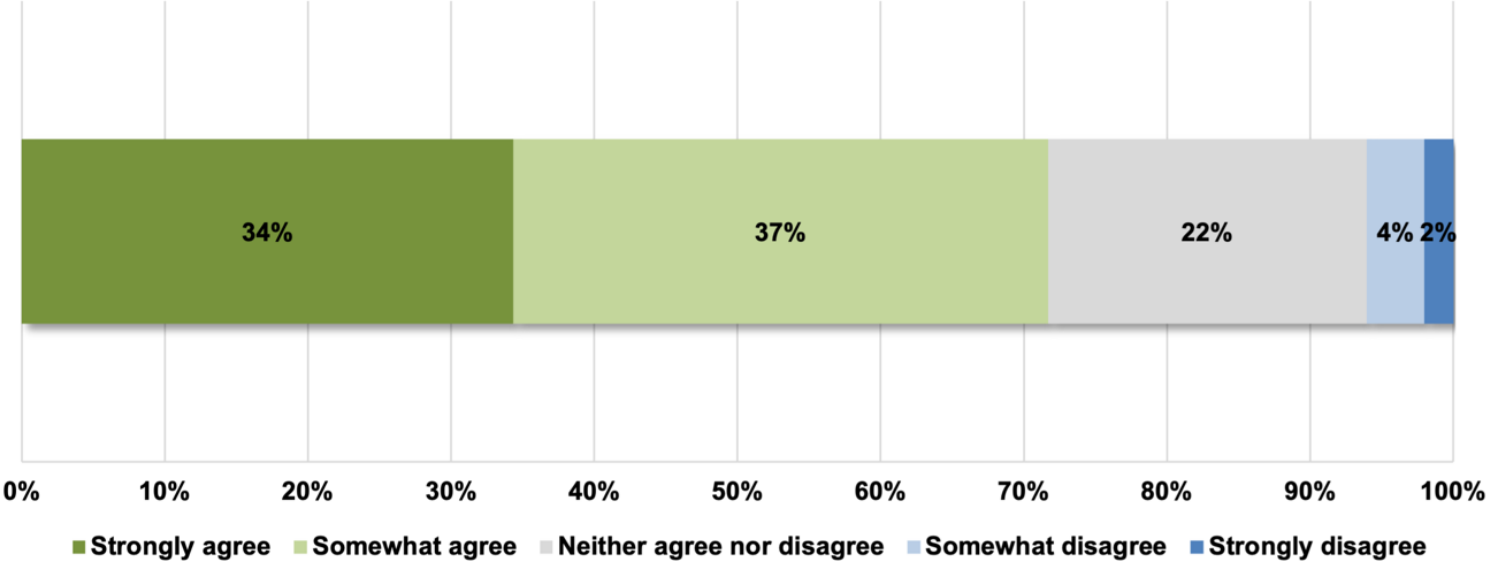


Source: Packaged Facts August 2024 Survey of Pet Owners



Science-Based and Veterinary Formulations

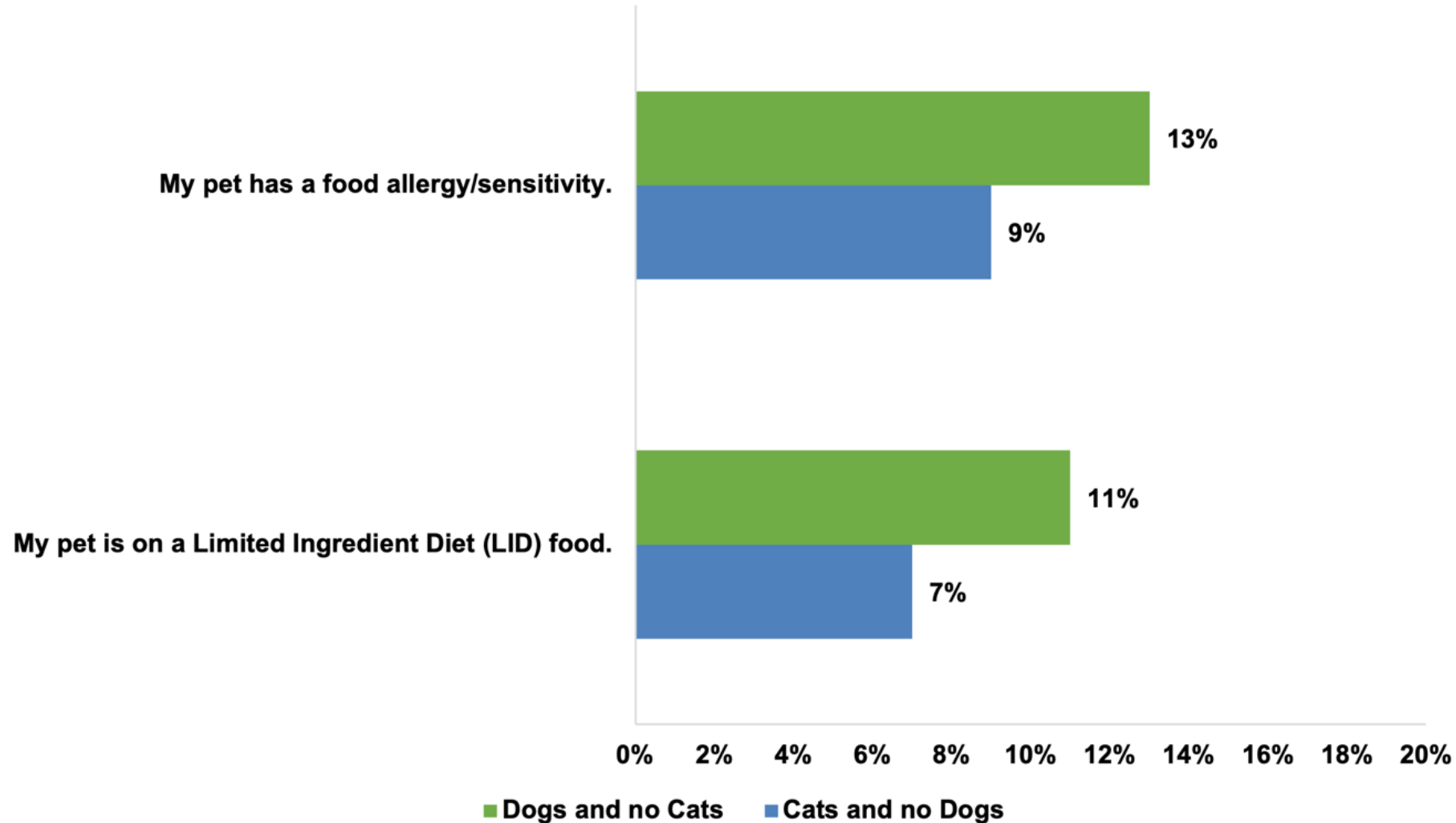
Agreement with the Statement, “I like the idea of pet food backed by scientific research”



Source: Packaged Facts August 2024 Survey of Pet Owners



Limited Ingredient Formulations



Final Thoughts

- **Pet owners are feeling the pressure of the current economic environment**
- **Positioning on health & wellness provides additional value considerations**
- **Condition-specific, science-based/veterinary, and limited ingredient formulations offer added value**



Thank you!

Questions?

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