



GLOBAL MARKET TRENDS:  
ANIMAL NUTRITION



## MARKET OVERVIEW



Global Animal Nutrition was worth about **USD 23.87 billion** in 2022

**CAGR**  
**6.5%**



**USD 32.70 billion** in 2027

Source: Industry ARC, 2022



**100%**

In 2004, the FAO/WHO Codex Alimentarius Commission approved a Code of Practice on **Good Animal Feeding.**

Animal nutrition market growth is driven by growing demand for **safe** and **healthy** animal food, restrictions on the use of **antibiotics**, increasing awareness among producers regarding animal health.

Source: Coherent Market Insights, 2022



According to Food and Agriculture Organization, city population have a varied diet rich in animal fats & proteins, and by higher consumption of poultry, meat, milk & other dairy products in comparison to rural population.

Source: Coherent Market Insights, 2022



Trends in companion animal nutrition often mirror trends in human nutrition, reflecting the desire for pet owners to feed diets they consider healthy and beneficial for the well-being of their pets.

Source: Food Engineering, 2020



KEY TRENDS

## PROSPECT & OPPORTUNITIES

- ❖ Premiumization
- ❖ Sustainability
- ❖ Health & Well-being



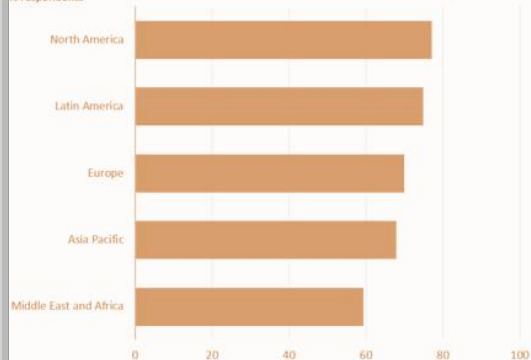
# Premiumization

Pets are growingly treated as family members by their owners, and they want them to intake quality and premium food to keep their companion healthy, active and strong.



Pet owners are searching for treats to their pet children which are close to human grade food with high quality and individualized ingredients.

Pet Owners Perceiving Their Pets as Beloved Members of the Family 2022  
% respondents



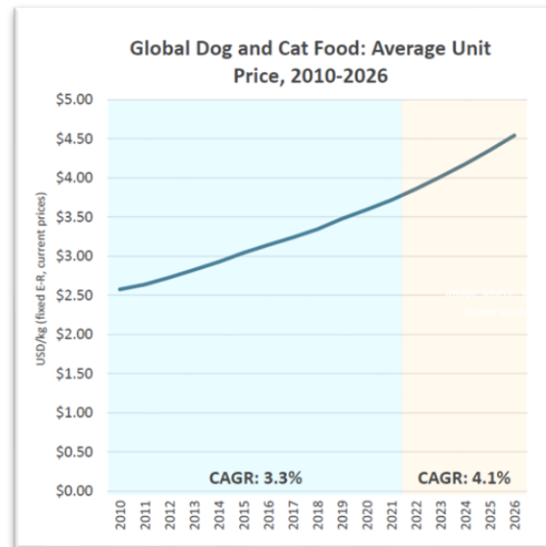
Source: Voice of The Consumer – Lifestyle Survey  
Note: Fielded in Jan-Feb 2022, n = 12,072

Source: Euromonitor International, 2022

According to Euromonitor International's Products Claims and Positioning 2021



Grain-free pet food rise in popularity after sales grew by **4.9%** from July 2020 to July 2021



Source: Armando, 2021

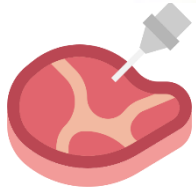
# Sustainability



Words such as “sustainably sourced” and “grass-fed” are increasingly seen on pet-food packaging and sustainability drives plant-based options and alternative protein, as well as development of recyclable packaging.

According to **Euromonitor International’s** Voice of the Consumer: Lifestyle Survey, nearly **60%** of pet owners try to reduce plastic usage, and **45%** prefer sustainable packaging.

Source: Euromonitor International, 2022



Encompassed within sustainability efforts is the usage of alternative sources of proteins include **insect-based**, **lab-grown** or **cultured cell** and **microbial proteins**.

Source: Beaton, L., 2022



**Nestlé Purina** had launched both **insect and plant protein** into pet food ~ becomes the world’s biggest food group tests more environmentally sustainable protein sources.

Source: Reuters, 2020



**Mars Petcare** has introduced food safe recycled content **polypropylene (PP)** into its pet food packaging to achieve **30%** average recycled content in plastic packaging and to reduce by **25%** of usage of virgin plastic.

Source: Pet Food Industry, 2021

# Health & Well-being

The **health and wellness** trend is expanding from food to **pet care**, while the role of functional and natural ingredients is significantly increasing.



A shift from general wellbeing to specific functionality drives ingredients that address **digestive, joint, heart, dental and skin health**, as well as **mental wellbeing**.

*Source: Euromonitor International, 2022*



**Turmeric, honey & coconut** ~ functional ingredients in pet food translated from human health and wellness trends – **biohacking**.

*Source: Petfood Forum, 2018*

Functional ingredients that commonly found within the pet food:

Benefits	Functional Ingredients
<b>Joint care</b>	Glucosamine, Chondroitin, MSM, Hyaluronic acid, Green lipped mussel, Vitamin C, Turmeric, Omega 3 fatty acids
<b>Skin &amp; Coat</b>	Omega 3 fatty acids, Chelated zinc, biotin
<b>GI Health</b>	Prebiotics (such as fructooligosaccharides [FOS] and mannan oligosaccharides [MOS]), probiotics, postbiotics
<b>Immune Function</b>	Mannan oligosaccharides (MOS), nucleotides
<b>Heart Health</b>	Taurine, L-carnitine
<b>Weight Management</b>	L-carnitine
<b>Dental</b>	Physical abrasion (i.e., cellulose), 'breath buster' (i.e., parsley, mint), sodium tripolyphosphate (STTP) and other polyphosphates
<b>Hairball Control (in cats)</b>	Cellulose, psyllium husk

*Source: Ingredients Network, 2022*





## MARKET EXAMPLES

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# Premiumization



**Varieties:** Original, Puppy, Ocean, Wild Game, Lamb, Reduced Fat, Senior, Small Breed Original, Small Breed Puppy, Small Breed Healthy Weight, Large Breed, Large Breed Puppy

## WELLNESS CORE Small Breed Original

- CORE Small Breed has optimum protein and calorie levels to help support small breeds who have higher energy needs.
- Our **Grain-Free, Protein-Rich** dry dog food is packed with premium protein along with nutrient-rich superfoods and nutritional supplements to ensure your dog has everything they need to thrive from the CORE.
- Product of USA.
- **Ingredients:** Deboned Turkey, Turkey Meal (source of Glucosamine), Chicken Meal (source of Chondroitin Sulfate), Lentils, Peas, Dried Ground Potatoes, Chicken Fat (preserved with Mixed Tocopherols), Tomato Pomace, Ground Flaxseed, Natural Chicken Flavor, Salmon Oil, **\*Taurine**, **\*Choline Chloride**, **\*Vitamin E Supplement**, Spinach, Broccoli, Carrots, Parsley, Apples, Blueberries, Kale, Spearmint, Zinc Proteinates, Mixed Tocopherols added to preserve freshness, Zinc Sulfate, **\*Calcium Carbonate**, **\*Niacin**, Iron Proteinates, Ferrous Sulfate, **\*Vitamin A Supplement**, Copper Sulfate, **\*Thiamine Mononitrate**, Copper Proteinates, Manganese Proteinates, Manganese Sulfate, **\*d-Calcium Pantothenate**, **\*Sodium Selenite**, **\*Pyridoxine Hydrochloride**, **\*Riboflavin**, **\*Biotin**, **\*Vitamin D3 Supplement**, **\*Chicory Root Extract**, Yucca Schidigera Extract, Calcium Iodate, **\*Vitamin B12 Supplement**, **\*Folic Acid**, **\*Ascorbic Acid (Vitamin C)**, Dried Lactobacillus plantarum Fermentation Product, Dried Enterococcus faecium Fermentation Product, Dried Lactobacillus casei Fermentation Product, **\*Dried Lactobacillus acidophilus Fermentation Product**, **\*Rosemary Extract**, **\*Green Tea Extract**, Spearmint Extract.

Taurine is an essential amino acid for cats & dogs because cats cannot synthesize it and must acquire from the diet. Dogs can synthesize it from methionine & cysteine

# Premiumization



## ORIJEN Six Fish Grain-Free Dry Dog Food

- Crafted with 85% premium fish ingredients, for a strong source of essential protein, vitamins & minerals.
- Freeze-dried coated for a burst of raw flavor!
- Product of USA.
- **Ingredients:** Whole Atlantic Mackerel, Whole Atlantic Herring, Monkfish, Acadian Redfish, Flounder, Whole Silver Hake, Mackerel Meal, Herring Meal, Blue Whiting Meal, Sunflower Oil, Whole Red Lentils, Whole Pinto Beans, Cod Meal, Pollock Meal, Safflower Oil, Whole Green Peas, Whole Green Lentils, Whole Navy Beans, Lentil Fiber, Natural Cod Flavor, Whole Chickpeas, Pollock Oil, Freeze-dried Cod Liver, Whole Pumpkin, Whole Butternut Squash, Mixed Tocopherols (preservative), Kale, Spinach, Mustard Greens, Collard Greens, Turnip Greens, Whole Carrots, Whole Apples, Whole Pears, Pumpkin Seeds, Sunflower Seeds, Dried Kelp, Zinc Proteinate, \*D-calcium Pantothenate, Copper Proteinate, Chicory Root, Turmeric, Sarsaparilla Root, Althea Root, Rosehips, Juniper Berries, \*Dried Lactobacillus acidophilus Fermentation Product, Dried Bifidobacterium animalis Fermentation Product, Dried Lactobacillus casei Fermentation Product.

Probiotic feed could ensure more dry matter intake, daily feed conversion efficiency & digestibility of nutrients in animals

Source: Anee, 2021

# Premiumization



## Royal Canin Shih Tzu Puppy Dry Dog Food

- Tailor-made nutrition created just for your pure breed Shih Tzu puppy.
- The unique kibble shape and texture are specially designed for your small breed Shih Tzu's short muzzle and underbite, making it easy for them to pick up and chew.
- Product of France.
- **Ingredients:** Chicken By-product Meal, Brewers Rice, Corn, Chicken Fat, \*Wheat Gluten, Dried Plain Beet Pulp, Natural Flavors, Fish Oil, Vegetable Oil, Sodium Silico Aluminate, \*Monocalcium Phosphate, \*Potassium Chloride, \*Calcium Carbonate, \*Fructooligosaccharides, \*Sodium Tripolyphosphate, \*Vitamins [DL-alpha Tocopherol Acetate (Source of Vitamin E), Niacin Supplement, L-ascorbyl-2-polyphosphate (Source of Vitamin C), D-calcium Pantothenate, Biotin, Pyridoxine Hydrochloride (Vitamin B6), Riboflavin Supplement, Thiamine Mononitrate (Vitamin B1), Vitamin A Acetate, Folic Acid, Vitamin B12 Supplement, Vitamin D3 Supplement], Salt, Hydrolyzed Yeast (Source of Betaglucons), \*Choline Chloride, \*L-lysine, L-tyrosine, Marigold Extract (*Tagetes erecta* L.), DL-methionine, \*Taurine, Trace Minerals [Zinc Proteinate, \*Zinc Oxide, Manganese Proteinate, \*Ferrous Sulfate, Manganous Oxide, Copper Sulfate, Calcium Iodate, \*Sodium Selenite, Copper Proteinate], *Yucca schidigera* extract, \*L-carnitine, \*Carotene, \*Rosemary Extract, Preserved with Mixed Tocopherols and \*Citric Acid.

# Sustainability



## Purina Beyond Nature's Protein (Insects, Chicken & Fava Beans)

- The insect protein comes from black soldier fly larvae.
- The millet & fava beans provide protein, energy & fibre to aid digestion.
- All the ingredients are steamed to maintain nutrient quality.
- Product of Switzerland.
- **Ingredients:** Chicken (17%) (Including bones, meat, skin), Oats (16.5%), \*Barley (16.5%), Dried Insect Protein (12%), Rice (10%), Dehydrated Chicken Proteins, Animal Fats, Shelled Beans (4%), Digestate, Minerals, Carrot Powder.

# Sustainability



## Mars' Sheba Craft Selection

- High quality ingredients promote complete nutrition and balanced cat food
- Multipack with delicious varieties in a rich gravy sauce
- Without artificial colours or preservatives
- Chemical recycling packaging – converting plastic waste into chemicals to develop a flexible packaging materials
- The combination of SABIC's TRUCIRCLE polymer portfolio and Huhtamaki's innovation for easy tear, sterilizable polypropylene (PP) films – a pouch suitable for direct wet food contact
- Product of USA.
- **Ingredients:** Meat & Animal Derivatives (18%), Vegetable Protein Extracts, Fish & Fish Derivatives, Derivatives of Vegetable Origin, Minerals, Various Sugars.

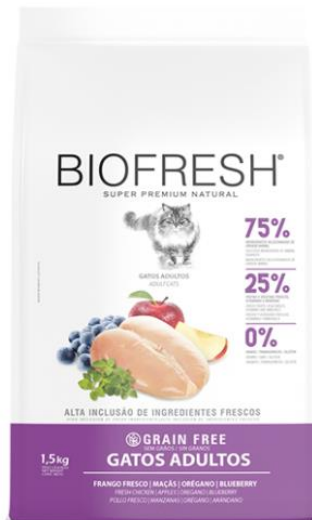
# Sustainability



## Wild Earth Dog Food

- Clean plant protein – made with high quality, sustainable plant proteins
- Complete nutrition
- Veterinary recipe – backed by science
- Total body benefits
- Sustainably sourced – requires less water and emits less CO2 than meat-based kibble
- Product of USA.
- **Ingredients:** Dried Yeast, Chickpeas, Peas, Oats, [\\*Pea Protein](#), Potato Protein, [\\*Canola Oil](#) (preserved with mixed tocopherols), Sweet Potato, Flaxseed Meal, Sunflower Oil (preserved with mixed tocopherols), [\\*Dicalcium Phosphate](#), [\\*Calcium Carbonate](#), Natural Flavor, Marine Microalgae, [\\*Choline Chloride](#), [\\*Taurine](#), Dried *Aspergillus oryzae* Fermentation Product, [\\*Inulin \(from chicory root\)](#), [\\*Potassium Chloride](#), Zinc Proteinate, Iron Proteinate, [\\*Fructooligosaccharides](#), [\\*Tocopherols](#) (preservative), Salt, [\\*L-Carnitine](#), [\\*Vitamin E Supplement](#), Blueberries, Cranberries, Pumpkin, Spinach, Wheat Germ, [\\*Vitamin A Supplement](#), Copper Proteinate, Manganese Proteinate, [\\*Sodium Selenite](#), [\\*d-Calcium Pantothenate](#), [\\*Riboflavin Supplement](#), [\\*Thiamine Mononitrate](#), [\\*Vitamin B12 Supplement](#), Pyroxidine Hydrochloride, [\\*Vitamin D2 Supplement](#), Calcium Iodate, [\\*Folic Acid](#), [\\*Rosemary Extract](#).  
Natural animal feed additives, contains antimicrobial & antioxidant properties

# Health & Well-being



**Varieties:** Chicken, Salmon & White Fish

## Biofresh Chicken for Adults Cats

- Developed with low incorporation of carbohydrates from alternative source and high levels of protein and fat.
- Artificial coloring, flavoring & preservative free
- GMO-free
- Grain free
- Designed for carnivores
  
- Product of Brazil.
  
- **Ingredients:** Selection of Fresh Meat (Chicken Meat, Chicken Liver, Mechanically Deboned Chicken Meat and Fish Meat) (min. 20%), Selection of Fresh Fruits, Vegetables and Herbs (Apple, Carrot, Beet and Oregano) (min. 2%), Pork Meal, **\*Fish Oil** (Natural Source of EPA and DHA), Poultry By-product Meal and Chicken Oil (Naturally Preserved with Tocopherols), Blueberry Extract, Yucca Extract, **\*Green Tea Extract**, **\*Egg Powder**, **\*Cassava Flour**, Cellulose Powder, Animal Digest, Beet Pulp, Dehydrated Peas, Dehydrated Inactivated Brewer's Yeast, Yeast Cell Wall (Source of Mannan Oligosaccharides), **\*Inulin** (min. 0,02%), Sodium Hexametaphosphate, Phosphoric Acid, Sodium Chloride, **\*Taurine**, DL-methionine, **\*L-lysine**, **\*Choline Chloride**, **\*Potassium Chloride**, **\*Vitamins (A, B1, B2, B6, B12, C, D3, E, K3, Folic Acid, Pantothenic Acid, Biotin and Niacin)**, Amino Acid-chelated Minerals (Copper, Iron, Manganese, Zinc and Selenium), Calcium Iodate and Natural Antioxidants (**\*Tocopherol**, **\*Rosemary Extract** and **\*Citric Acid**).



# Health & Well-being

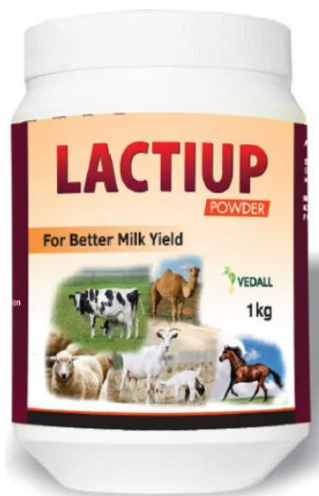


**Varieties:** Salmon, Lamb & Pork

## VitalPlus Premium Dog Food Pork Recipe

- Complete & balanced food for dogs of all breeds.
- Made with real meat of high biological value and energy dense selected quality proteins with vitamin and minerals the dogs require for a healthy life.
- Enriched with various supplements to support the overall wellbeing of the dogs – Vitamin A, Copper and Essential Fatty Acids to promote a soft and shiny coat, Vitamin E and Selenium to strengthen the immune system.
- Product of France.
- **Ingredients:** Cereals, Meat and Meat Derivatives (34% Pork, Derived from Dehydrated Pork), Vegetable Origin Sub-products, Oils and Fats, **\*Vitamins**, Mineral Substances.

# Health & Well-being



## Lactiup Powder Animal Feed Supplement

- A rumen specific vitamin mineral mixture for proper metabolic activity for maximum feed conversion and feed efficiency
  - To maintain body condition during transport
  - To maximize microbial multiplication & normalize rumen fermentation
  - To improve nitrogen metabolism for production and growth
  - To stabilize rumen ecosystem & pH
  - To restore vitality for new arrivals
- 
- Product of India.
  - **Composition:** Each 100gms provides:
    - \*Vitamin A: 1,25,000 IU
    - \*Vitamin D3: 12,500 IU
    - \*Vitamin E: 50 IU
    - \*Calcium: 25.20 gms
    - Phosphorus: 18.00 gms
    - Manganese: 0.20 gms
    - \*Copper: 0.15 gms
    - \*Zinc: 0.10 gms
    - Iodine: 0.05 gms
    - Cobalt: 0.02 gms



To know more about the featured ingredients in this market trends report as well as how you can create better food products for your consumers, contact our Food & Beverage Intelligence (FBi) team.

**Email:** [info@dpointernational.com](mailto:info@dpointernational.com)

**Web:** [www.dpointernational.com](http://www.dpointernational.com)



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THANK YOU