



MARKET TRENDS IN PHILIPPINES: ANIMAL NUTRITION

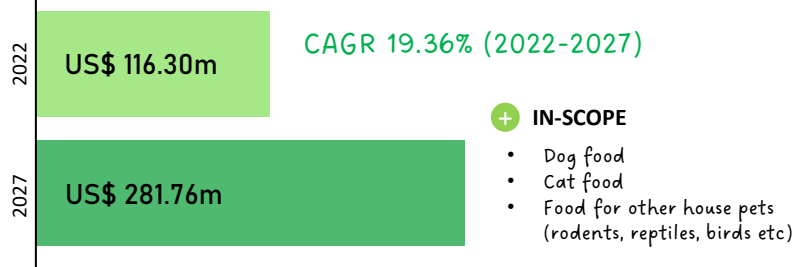


MARKET OVERVIEW & KEY TRENDS

PHILIPPINES ANIMAL NUTRITION MARKET

Forecast Analysis

Pet Food



Volume in pet food are expected to amount to 136.3mkg by 2027 and is expected to show a volume growth of 16.0% in 2023.



Source: Statista, 2022

In relation to total population figures, per person revenues of US\$1.03 are generated in 2022. The average volume per person in the Pet Food segment is expected to amount to 0.6kg in 2022.

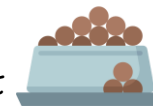


PROSPECTS AND OPPORTUNITIES



Pet Humanisation:
Premium & Functional

Dry Pet Food Leads
The Dog Food Segment



Wet Pet Food Leads
The Cat Food Segment



Pet Humanisation: Premium & Functional

DID

YOU

KNOW?

Source: Rakuten Insights, 2021

The Philippines have the highest rate of pet ownership among the Southeast Asian countries at 83%, led by dogs at 67%, cats at 43%, fish at 13%, and birds at 10%



In Philippines, the pet food category is expected to see a significant expansion with the offerings of health-orientated products and further bolstered by the pet humanisation trend.

Source: Euromonitor International, 2022a

More Filipino households are now caring for pets and treating them as family.

The pet humanisation trend has made pet owners increasingly willing to do everything they can to protect and increase the quality of life for their pets. As Gen Z and millennials become a greater proportion of pet parents, that creates upward pressure on premiumization" - spending more for better quality food and services for their pets.

Source: Vendor, 2022



High degree of humanisation of pets is contributing to the surge in demand for pet-care products and high-quality pet food products that contain essential amino acids, carbohydrates, linoleic acid, and fibres.

Source: Technavio, 2022

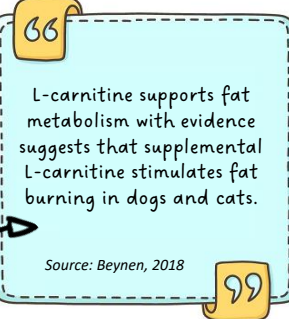
Pet Humanisation: Premium & Functional



PEDIGREE ® Pro Adult Mini & Small Breed Dry Dog Food

- Small dogs have a special diet as their metabolism is a lot faster. They need more calories per pound, and this also includes the amount of protein they need.
- There's 28% protein in this enhanced nutrition formulation, giving them the essential amino acids to keep their little but energized bodies active and healthy.
- Other nutrients like L-Carnitine also help their metabolism, while other antioxidants boost their immune system as small breeds are known to have a longer lifespan.
- Product of Thailand

Ingredients: Cereals (Corn and/or Wheat and/or Barley), Poultry and Poultry by Product Meal, Chicken Oil, Animal Hydrolyze, ***Minerals**, ***Vitamins**, ***Amino Acid**, ***Flavour**, Preservatives, ***L-Carnitine**.



Source: Beynen, 2018

Pet Humanisation: Premium & Functional



Purina Fancy Feast® Puree Kiss Tuna Puree with Tuna Flakes Wet Cat Treats

- Made with real tuna & tuna flakes.
- Comes in a smooth & creamy treat.
- Made with real, high-quality ingredients because your cat deserves nothing but the best.
- Product of Thailand

Ingredients: Tuna (Light Meat), Tuna (Red Meat), Thickening Agent (Modified Tapioca Starch, Guar Gum), Seasoning (Flavours), Fish Extract, Sunflower Oil, ***Vitamin E**, ***Fructooligosaccharide**.

“The presence of prebiotics, such as FOS and Inulin, in the balanced food consumed by dogs and cats nourishes and favors the normal functioning of intestinal cells”

Source: GEPSA Pet Food, n.d.

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Pet Humanisation: Premium & Functional



Purina PRO PLAN® Adult Sensitive Digestion All Size with Lamb & Rice Dry Dog Food

- Easily digestible for dogs with digestive sensitivities.
- Added insoluble dietary fibres to help regulate intestinal transit and promote digestive comfort.
- Contains Prebiotics proven to increase the number of good bacteria in the gut and help improve digestive health.
- Omega 3 and 6 fatty acids and high-quality protein to help support healthy skin and coat.
- Highly digestible food to ensure superior nutrient absorption.
- High quality ingredients including real lamb for a superior taste.
- Scientifically proven antioxidants to boost immune defence.
- No added artificial colours, flavours and preservatives.
- Product of Thailand

Ingredients: Lamb, Brewers Rice, Whole Grain Wheat, Dehydrated Chicken, ***Wheat Protein**, Barley, Animal Fat Preserved With Mixed-tocopherols (Form Of Vitamin E), Dehydrated Fish, *Minerals, *Vitamins, *Amino Acids, Organic Acids And Natural Flavours (Including ***Calcium**, ***Phosphorus**, ***Sodium**, ***Chloride**, ***Potassium**, ***Magnesium**, ***Manganese**, ***Copper**, ***Zinc**, ***Iron**, ***Iodine**, Selenium, Aluminosilicate, ***Vitamin A**, ***Vitamin B1**, ***Vitamin B2**, ***Vitamin B3**, ***Folic Acid**, ***Vitamin B5**, ***Vitamin B6**, ***Vitamin B12**, ***Vitamin C**, ***Vitamin D**, ***Vitamin E**, ***Choline**), Animal Digest, Beet Pulp, ***Chicory**, Fish Oil And Natural Antioxidants.

Dry Pet Food Leads The Dog Food Segment



TOP COUNTRIES WITH HIGHEST DOG POPULATION

- #1 USA
- #2 China
- #3 Russia
- #4 Japan
- #5 Philippines

Philippines is in Top 5 for
highest dog population in the World!

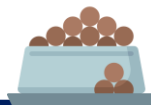
Source: Plimico & Gold Coin, 2021



Store owners in the Philippines stated that dry pet food are the most saleable dog food category for dog owners, wet pet food are purchased only as a supplement for dry food to whet a dog's appetite, especially when sick.

Source: Pet Fair South East Asia, 2022

Benefits of Dry Dog Food Compared to Wet Dog Food...



Dry dog food, or "kibble," often offers certain benefits that wet food doesn't provide, such as:



Dental health benefits: Dry food encourages dogs to chew their food, which aids in preventing tartar buildup and secondary periodontal disease.



Convenience: Compared to wet food, dry diets are much easier to pre-portion, and they won't spoil if left out all day. This can be beneficial for dogs that are grazers.



Financially feasible: Depending on the brand of food, dry diets may be less expensive to purchase and store long-term.



Food enrichment: Kibble is easier to integrate into food puzzles and slow feeders that may improve a dog's quality of life through cognitive stimulation.

Source: Hoffmann, 2021

Dry Pet Food Leads The Dog Food Segment

Pedigree Adult 1 Years Dry Dog Food

- Complete pet food for adult dogs.
- the dry bags of PEDIGREE® VITAL PROTECTION™ are designed to deliver nutrition that addresses these four needs: the products help support a strong immune system, healthy skin and coat, good digestion, and also help to clean your dog's teeth.
- Feeding a mixture of wet and dry food is a healthy way to feed your dog. The wet food has a higher moisture content and is less calorie dense, whilst dry food can help maintain healthy teeth and gums. Why not try adding one of our tasty pouches to your dog's meal?
- Product of Thailand



Flavour: Beef & Vegetables, Chicken & Vegetables, Lamb & Vegetables

Ingredients for Chicken & Vegetables Flavour: Cereals (Corn and/or Wheat and/or Defatted Rice Bran), Poultry and Poultry by Product, Oils (Palm, Soybean), Soybean Meal, ***Minerals**, ***Flavours**, ***Vitamins**, Methionine, Iodised Salt, Colouring agents, Preservatives, Dried Vegetable.

Dry Pet Food Leads The Dog Food Segment



Bosch High Premium Concept Dog Food – Puppy

- For puppies, preferably up to the 4th month.
- Our Puppy formula is perfectly designed for the transitional period after weaning and can be used already by the third week, soaked in water or puppy milk. The use of colostrum and the specific immune complex of mannans and glucans (developed by nutrition specialists) strengthen your puppy's immune system. We recommend our Puppy formula for use with weaned puppies until the fourth month.
- With colostrum which strengthens the puppy's immune system. With mannans and glucans to stabilize the intestinal flora and immune defences
- Product of Germany

Ingredients: Fresh Poultry (30 %), Poultry Protein (Dried), Rice, Barley, Maize, Animal Fat, Dried Beet Pulp (Sugar Removed), Skimmed Milk Powder, ***Powdered Egg**, Fish Meal, Hydrolysed Protein, Greaves (Dried), Linseed, Peas (Dried), Yeast (Dried, 0.1 % Mannan Saccharides, 0.06 % Beta-glucans), Fish Oil, Colostrum (0.2 %), Sodium Chloride, Green-lipped Mussels (Dried, 0.1 %), ***Chicory** (Dried).

Dried chicory root powder is a good source of inulin type fructans and oligofructose chains known for having prebiotic effect.

Source: Gurram et al., 2022

66

Dry Pet Food Leads The Dog Food Segment



Orijen Original Dog Food

- ORIJEN® Original recipe is packed with 85%* quality animal ingredients fresh or raw+ like free-run chicken and turkey, and wild-caught fish.
- With rich inclusions of Wholeprey animals, ORIJEN dog food is made with the most nutrient-dense, succulent parts of the prey to deliver the nutrition dogs need. The result is a diet for your canine companion that is beyond comparison.
- 85% quality poultry and fish ingredients, providing a strong source of essential protein, vitamins, and minerals
- Product of USA

Ingredients: Chicken, Turkey, Flounder, Whole Mackerel, Chicken Liver, Turkey GIBLETS (Liver, Heart, Gizzard), Whole Herring, Eggs, Dehydrated Chicken, Dehydrated Turkey, Dehydrated Chicken Liver, Dehydrated Egg, Dehydrated Mackerel, Whole Red Lentils, Whole Pinto Beans, Chicken Fat, Whole Green Lentils, Whole Navy Beans, Whole Chickpeas, Lentil Fiber, Natural Chicken Flavour, Whole Peas, Pollock Oil, Pea Starch, Chicken Heart, Whole Pumpkin, Whole Butternut Squash, Collard Greens, Whole Apples, Whole Pears, Whole Cranberries, Dried Kelp, Salt, Zinc Proteinates, ***Mixed Tocopherols** (Preservative), ***Vitamin E Supplement**, ***Thiamine Mononitrate**, ***Calcium Pantothenate**, Copper Proteinates, ***Dried Chicory Root**, Turmeric, Sarsaparilla Root, Althea Root, Rosehips, Juniper Berries, ***Citric Acid** (Preservative), Rosemary Extract, Dried Lactobacillus Acidophilus Fermentation Product, Dried Bifidobacterium Animalis Fermentation Product, Dried Lactobacillus Casei Fermentation Product.

Wet Pet Food Leads The Cat Food Segment



In general, dry cat food is expected to record faster volume growth than wet cat food as it benefiting from a more affordable price point.

However, there is an opportunity for health-oriented pet parents to switch to wet format in line with health and wellness trends, by highlighting wet cat food's capacity to help to keep cats healthy by improving their water intake, given that cats are not fond of drinking water.

Source: Euromonitor International, 2022b



Moisture Levels

Dry cat food – approximately 10% of water, and the other 90% consists of dry matter such as carbohydrates, fats and vitamins.

Canned food contains much more water—approximately 70%, compared to dry matter.

Source: Meeks, 2021



This can be important to consider when choosing which to feed if your cat has certain health conditions that may benefit from more water intake.



such as kidney disease, diabetes,
lower urinary tract disease,
constipation, overweight

Sources: International Cat Care, 2019; Meeks, 2021

It has been noted that cat owners are more likely to pamper their pets with more "human-grade" wet food which came in small cans and pouches.

Source: Pet Fair South East Asia, 2022



Wet Pet Food Leads The Cat Food Segment



Goodest Cat Chicken Chomp Chunks in Gravy 85g Cat Wet Food

- High in protein
- With Zinc, Vitamin E and DHA
- 100% nourishment, for strong immunity
- Helps cat to be active and alert
- Product of Philippines

Ingredients: Chicken Meat, Tuna, Beef Liver, Chicken by products, Wheat Gluten, Gravy, Soybean Oil, ***Minerals**, ***Amino Acids**, Colouring Agents, Sugar, ***Vitamins**, DHA.

Wet Pet Food Leads The Cat Food Segment



Whiskas Mackerel Cat Wet Food Pouch

- Specially formulated for cats aged 1 year old and above
- Formulated with omega 3 & 6 fats and zinc for a healthy and shiny coat
- Complete with vitamin A and taurine for healthy eyesight
- Filled with proteins from real fish, including fats, vitamins and minerals
- Contains antioxidants (vitamin E and selenium) for a healthy immune system
- Product of Thailand

Ingredients: Sardine, Mackerel, White fish, Soybean oil, Gelling agents, ***Amino acids**, ***Minerals**, ***Vitamins**, EDTA, Coloring agents.

Wet Pet Food Leads The Cat Food Segment



Sheba® Perfect Portions™ Premium Paté Roasted Chicken & Liver Entrée

- Each SHEBA Wet Cat Food Paté PERFECT PORTIONS tray is made without grain or corn, and has no artificial flavors or preservatives, so you can feel good about feeding it to them for every meal. With a light and delectable texture, this chicken and liver flavored and protein rich soft pate entrée is truly enticing... your cat will devour every tasty bite.
- Product of USA

Ingredients: Chicken, Poultry Liver, Water, Chicken Broth, Guar Gum, Potassium Chloride, Sodium Tripolyphosphate, Fish Oil, *Calcium Carbonate, *Choline Chloride, *Magnesium Sulfate, Tapioca Starch, DL-Methionine, *Taurine, Salt, *Thiamine Mononitrate, *Vitamin E Supplement, *Zinc Sulphate, *Ferrous Sulfate, *Manganese Sulfate, *Copper Sulfate, *Pyridoxine Hydrochloride, *Potassium Iodide, *Vitamin D3 Supplement, *Folic Acid, Menadione Sodium Bisulfite Complex.

Choline is an essential nutrient that plays an important role in liver health and nerve transmission, and thereby also cognitive function and muscle function in cats.

Source: Dumbravescu, 2021



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

Web: www.dpointernational.com



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THANK YOU