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## Forward Thinking: Top Dawg

The humanization of pet care is a driving force behind pet food innovation, with an emphasis on dogs.

According to the American Pet Products Association, pet ownership in the last 30 years has risen from 56% to 68% of households<sup>a</sup>. According to the American Veterinary Medical Association, in 2016 the dog was the most popular pet in the country, living in about 38% of homes<sup>b</sup>. According to Zulily, Millennials are the primary pet-owning demographic; 75% of American millennials are dog owners and more than 50% are cat owners, while 50% of the general population own a dog and 35% own a cat<sup>c</sup>. In the spring of 2019, Lock Haven University, one of Pennsylvania State System's 14 schools, allowed students to have pets other than fish live in the school's North Hall dorm.

Pet owners often see their pets as children or as the first step toward starting a family. Millennials are driving “pet-renthood,” with pet owners projecting their human needs onto their pets. Human lifestyle trends such as premium, plant-based, free-from, CBD-infused and sustainable food, as well as amenities like restaurants, bars, delivery, subscription-based

<sup>a</sup>[www.bizjournals.com/bizwomen/news/latest-news/2018/12/pet-owners-dish-out-32-7b-for-food-and-treats.html](http://www.bizjournals.com/bizwomen/news/latest-news/2018/12/pet-owners-dish-out-32-7b-for-food-and-treats.html)

<sup>b</sup>[www.vmdtoday.com/news/ownership-of-lesspets-on-the-rise-in-the-us](http://www.vmdtoday.com/news/ownership-of-lesspets-on-the-rise-in-the-us)

<sup>c</sup>[www.jwtintelligence.com/2019/02/petcare-everywhere/](http://www.jwtintelligence.com/2019/02/petcare-everywhere/)

products and hospitality services are mirrored in the pet industry. The humanization of pet care is a driving force behind pet food innovation, with an emphasis on dogs.

## Just the Numbers

According to *ResearchAndMarkets.com*, the global pet food market was worth \$98.3 billion in 2018, growing at a CAGR of 5.3% during the 2011-2018 forecast period. The market is expected to reach \$128.4 billion by 2024, growing at a CAGR of 4.5% during 2019-2024<sup>d</sup>. According to the American Pet Products Association, in 2018, U.S. pet lovers spent \$72.56 billion on their pets, including food, supplies, vet care, grooming and boarding, a 4% increase compared to 2017<sup>e</sup>. Pet food sales on Amazon.com reached an estimated \$1 billion in sales in 2018, up 20% compared to 2017, according to Edge by Ascential<sup>f</sup>. In addition, Edge by Ascential reported that the pet food and feeding supplies category accounted for more than half of all pet sales on Amazon in the United States with an estimated \$365 million in Q3 2018, nearly six times the size of the next largest category in pet products.

## Humanization of Pet Food

Pets (also known as “fur babies”) are like children, and the experiential economy has humanized pet foods. For example, U.S. sales of fresh pet food in groceries and pet stores jumped 70% to more than \$546 million between 2015 and 2018, according to Nielsen, and this figure does not include online sales or people making their own fresh pet food<sup>g</sup>. Additionally, Nielsen reported that in 2018 consumers spent \$33 million on pet food with human-grade products<sup>h</sup>. Furthermore, the popularity of organic and natural human food is now apparent in pet food. According to Industry Research, the organic pet food market is anticipated to increase at a CAGR of 9.08% during the years 2017-2021<sup>i</sup>. And the U.S. market share of natural pet products has more than doubled to 6.5% between 2013 and 2017, according

to Nielsen<sup>j</sup>. According to GfK, about 78% of new pet foods and treats marketed during 2017 made “natural” claims while 53% called out “grain-free”<sup>k</sup>.

According to a Luminer survey, terms like “natural,” “organic,” “holistic,” “human grade,” and “gourmet/premium” impact pet owners’ purchasing habits<sup>l</sup>. Nearly half (45%) of pet owners said they were more inclined to purchase pet food labeled as “natural,” while less than a quarter (23%) said they were more inclined to purchase pet food labeled as “organic.” Overall, 82% of pet owners said the use of any of these terms influenced their decision to purchase a product. A Beneo pet food survey revealed similar results. Over half (52%) of pet owners in Germany, the United Kingdom, the United States, China and Brazil, claim that seeing “made with natural ingredients” on a product influences the likelihood of them purchasing it, and 48% said they are more likely to buy products that have the “free from artificial ingredients” claim<sup>m</sup>.

Increasingly, pet owners are projecting their human needs onto their pets. Research from Michelson Found Animals Foundation revealed that 70% of people who follow a diet for themselves admitted to putting their pet on a special diet<sup>n</sup>. For example, almost half of pet owners who eat organic foods feed their pets organic diets (47% vs. 12%)

<sup>d</sup><https://www.ocregister.com/2018/11/13/petco-to-stop-selling-pet-food-with-artificial-ingredients-in-100-million-wager/>

<sup>k</sup>[www.foodprocessing.com/articles/2019/making-pet-food-more-human/](http://www.foodprocessing.com/articles/2019/making-pet-food-more-human/)

<sup>l</sup>[www.petproductnews.com/News/What-Aspects-of-Pet-Food-Labels-Turn-Pet-Owners-Off/](http://www.petproductnews.com/News/What-Aspects-of-Pet-Food-Labels-Turn-Pet-Owners-Off/)

<sup>m</sup><https://animalpharm.agribusinessintelligence.informa.com/AP015006/BENE0-Consumer-trends-drive-pet-food-sector-development-globally>

<sup>n</sup>[www.americanveterinarian.com/news/trends-in-pet-food-treat-purchases](http://www.americanveterinarian.com/news/trends-in-pet-food-treat-purchases)

<sup>d</sup><https://globenewswire.com/news-release/2019/02/21/1739493/0/en/Global-Pet-Food-Market-Report-2019-Industry-Trends-Share-Size-Growth-Opportunity-and-Forecasts-2011-2018-2019-2024.html>

<sup>e</sup>[www.americanpetproducts.org/press\\_industrytrends.asp](http://www.americanpetproducts.org/press_industrytrends.asp)

<sup>f</sup>[www.petproductnews.com/News/Amazons-Pet-Food-Sales-Hit-Billion-Dollar-Mark-in-2018/](http://www.petproductnews.com/News/Amazons-Pet-Food-Sales-Hit-Billion-Dollar-Mark-in-2018/)

<sup>g</sup><https://www.chicagotribune.com/business/ct-biz-fresh-pet-food-trend-20190403-story.html>

<sup>h</sup><https://www.nielsen.com/us/en/insights/article/2019/whos-winning-the-claim-game-in-the-pet-food-arena/>

<sup>i</sup><https://divireport.com/organic-pet-food-market-2021-analysis-of-opportunities-offered-by-high-growth-economies/>



JustFoodForDogs and Petco debuted a 1,350-square-foot in-store pet food kitchen with trained chefs who hand-prepare signature recipes and produce 2,000 pounds of fresh, USDA-certified pet-friendly human-grade food daily. Courtesy of JustFoodForDogs.

and pet owners on a protein-rich diet, feed their pets protein-rich foods as well (45% vs. 17%).

On-trend with human food and beverages, at the end of 2018, Petco announced it would stop selling dog and cat food or treats that contain artificial colors, flavors and preservatives by May 2019.<sup>1</sup> Common ingredients such as FD&C Red No. 3, butylated hydroxyanisole (BHA), butylated hydroxytoluene (BHT), glycerol tributyrate and benzaldehyde were on the list of more than 40 ingredients to be eliminated. In May 2019, JustFoodForDogs, the first-ever health and wellness kitchen for dogs, and Petco debuted the inaugural in-store pet food kitchen at Petco's flagship store in New York City's Union Square neighborhood. The 1,350 square-foot JustFoodForDogs kitchen, the company's ninth, features trained chefs who hand-prepare signature recipes and produce 2,000 pounds of fresh, USDA-certified pet-friendly human-grade food daily such as **Beef and Russet Potato**, **Chicken and White Rice** and **Turkey and Whole Wheat Macaroni**, as well as a line of therapeutic diets prescribed by veterinarians.

BrightPet Nutrition Group released **By Nature**, a premium pet food brand, packaged with sustainable materials and formulated with high-quality proteins, superfood ingredients and the manufacturer's proprietary Superfusion<sup>®</sup> probiotics. The dog food is "slow cooked for optimum nutrient retention" and available in three grain-free varieties: **Lamb and Turkey**, **Turkey and Duck** and **Salmon and Menhaden Fish**. **Chicken and Turkey with Brown Rice** is another new product. In addition, the formulas include functional ingredients such as goji berry, ginger, taurine, turmeric, apple cider vinegar, chicory

<sup>®</sup>Superfusion is a registered trademark

root extract, kelp, pumpkin, spinach, blueberries, fava beans and coconut oil to support the immune system, and improve digestion, body and brain function. In January 2019, **Brandless** added an assortment of baby and pet products. The pet assortment includes protein-focused treats, organic beef bone broth from grass-fed cattle, supplement chews and daily multivitamins for dogs.

## Plant-Based Pet Food

Plant-based and vegan foods are currently the industry darling, and it is no surprise that dog food has followed suit. According to a November 23, 2018 Telegraph.co.uk article, one in six pet food suppliers has branched out into supplying vegan or vegetarian food for animals as owners embraced the new trend over ethical concerns with meat diets.<sup>2</sup> **Halo Holistic Garden of Vegan** is an award winning, non-GMO complete and balanced vegan pet food brand, which uses protein-rich plant-based ingredients like peas, chickpeas, pearled barley and oats in dry and wet food as well as treats. According to Halo CEO Myron Lyskanycz, "Vegan is our fastest growing category. Pet parents are feeding their dogs a vegan diet for its high-quality whole-food ingredients and because their dogs thrive on this delicious complete and balanced food." In March 2019, **Wild Earth**, a Berkeley biotech dog treat startup, garnered an investment from *Shark Tank* entrepreneur Mark Cuban to help the brand launch a line of plant-based dog treats. The **Superfood Dog Treats** are available in three flavors: **Banana & Cinnamon**, **Peanut Butter** and **Strawberry & Beet** and formulated with koji, the fungi used to create the savory umami flavor found typically in miso, soy sauce and sake. The brand's yeast and koji based **Clean Protein Dog Food** was released in September of 2019.



Wild Earth's Superfood Dog Treats are plant-based and formulated with koji, the fungi used to create the savory umami flavor found typically in miso, soy sauce and sake. Courtesy of Wild Earth.



Boss Dog Brand's probiotic Frozen Greek Style Yogurt treats for dogs are made with real yogurt, use 100% human grade, non-GMO ingredients and are free-from lactose, gluten, soy, corn and wheat, as well as artificial colors, flavors or preservatives. Courtesy of Boss Dog Brand.

## Clean Label, Free-From Claims

Like human foods, clean labels and free-from claims are popular callouts on pet food. According to Nielsen, pet food products with free-from wheat claims represented \$4.9 billion in sales in 2018, an increase of \$331.7 million dollars from the year before<sup>9</sup>. In 2018, pet food products with free-from soy claims accounted for \$4.4 billion in sales while free-from artificial color claims represented \$4.2 billion<sup>9</sup>.

Wellness Natural Pet Food introduced the **Wellness Core Collection** of grain-free dog food made with peas, chickpeas, flaxseed, canola oil and tomato pomace. Available in four recipes—**Cage-Free Duck, Free-Range Lamb, Sustainably-Sourced Salmon and Sustainably-Sourced Salmon for Small Breeds**—the products are made without the use of grains, chicken, potatoes, tapioca, dairy or wheat and are free of artificial flavors, colors and preservatives. **Wildology** pet food is formulated with ingredients such as kale, blueberries, carrots, chia seeds and Superlife Pro,<sup>r</sup> “a blend of nutrient-rich superfoods and antioxidants, and patent-pending probiotics to support a pet’s digestive and immune systems and help promote overall wellness.” The recipes do not contain artificial colors, artificial flavors, artificial preservatives, wheat, corn, soy, legumes, peas or dairy. **Honest Kitchen**, the pet food brand known for its pumpkin-spice lattes for dogs and human-grade pet foods, has added a **Whole Food Clusters Grain-Free** range in **Beef, Chicken** and **Turkey** varieties. The products are “100% human grade made with real whole foods, mixed in small batches, cold pressed, slow roasted and dehydrated to maintain the nutrients, aroma and textures of whole foods.” **Boss Dog Brand**<sup>s</sup>

<sup>9</sup>[www.nielsen.com/us/en/insights/podcast/2019/the-database-how-human-trends-are-driving-growth-for-u-s-pet-food/](http://www.nielsen.com/us/en/insights/podcast/2019/the-database-how-human-trends-are-driving-growth-for-u-s-pet-food/)

<sup>9</sup>[www.nielsen.com/us/en/insights/article/2019/whos-winning-the-claim-game-in-the-pet-food-arena/](http://www.nielsen.com/us/en/insights/article/2019/whos-winning-the-claim-game-in-the-pet-food-arena/)

<sup>r</sup>Superlife Pro is a registered trademark

<sup>s</sup>Boss Dog Brand is a registered trademark

debuted a line of probiotic **Frozen Greek Style Yogurt** treats for dogs in three flavor combinations: **Peanut Butter and Banana, Pumpkin and Cinnamon**, and **Real Cheddar and Bacon**. The products are made with real yogurt, use 100% human grade, non-GMO ingredients and are free-from lactose, gluten, soy, corn and wheat as well as artificial colors, flavors or preservatives. According to the brand, the treats “deliver the benefit of over 3 billion probiotic cultures per cup.”

## Sustainable Pet Food

Consumers’ growing concerns for sustainably sourced ingredients, ethical behavior and environmentally friendly products has also crossed over into pet food. **RootLab**, a Purina startup, is “creating a new approach to safe, sustainable ingredients and packaging” of dog food made with nutritional ingredients such as carp, cod and crickets. The products are available in four varieties: **Asian Carp & Sprouted Barley, Chicken, Egg & Cricket, Chicken Organs & Ancient Grains**, and **Cod & Chickpea**. UK brand **Yora Pet Foods** introduced **Insect Protein Dog Food** formulated with black soldier fly larvae, oats, potato, kale,



U.K. brand Yora Pet Foods introduced Insect Protein Dog Food formulated with black soldier fly larvae, oats, potato, kale, seaweed and chicory. Courtesy of Yora Pet Foods.

seaweed and chicory. According to the brand, the product is “made from 100% insect protein, grain-free, low allergenic potential, sustainable and an environmentally friendly delicacy for the modern canine household.”

## Keep Your Pets Calm with Hemp-Based CBD Products

CBD is the hottest trend happening in the food and beverage industry as addressed in Trendincite’s, “The Food and Beverage Industry Gets Lit” ([www.perfumerflavorist.com/flavor/trends/](http://www.perfumerflavorist.com/flavor/trends/)). Now CBD is making its way into pet products. According to Brightfield, CBD-infused pet products are an already estimated \$199 million business and expected to grow to \$1.16 billion by 2022<sup>1</sup>. The Michelson Found Animals Foundation reported that pet owners who have tried alternative therapies themselves have used them on their pets. This includes the growing use of CBD and hemp-based products, with 45% of pet owners surveyed using these products as part of a general health plan for their pets. **Honest Paws** offers **Hemp Dog Treats** in three formulas: **Creamy Coconut (Restore)**, **Roasted Peanut Butter (Calming)** and **Tasty Turmeric (Relief)**, each piece contains 5 mg of full spectrum CBD. Honest Paws also sells soft chews and hemp oil and, according to the brand, the products are all natural, non-GMO, soy-free and lab tested. In February 2019, **Pet Releaf Edibites** launched trial-size bags of the brand’s wholefood and human-grade CBD supplements for dogs. The trial bags are available in **Blueberry & Cranberry** and **Peanut Butter & Banana** flavors; each Edibite contains 30 mg of full spectrum hemp extract with 1.5 mg active CBD.

## Catering to Canines

Since pets are an extension of their owners, it is no surprise that amenities that humans have such as restaurants and bars are now catering to pets and their owners. **Lazy Dog Restaurant & Bar**, a California-based multi-unit chain, offers a menu just for dogs and serves **Grilled Hamburger Patty with Brown Rice** or **Grilled Chicken with Brown Rice** with a complimentary bowl of water. Dallas-based **Mutts Canine Cantina** is a dog park and fast casual eatery hybrid that serves concession-style food and craft beers on a dog-friendly patio and offers an off-leash park. In New York City’s trendy NoMad neighborhood, the Wilson restaurant in the Ininside Melia hotel, debuted a dog-friendly menu meant to be shared by dogs and their owners. It features a



Honest Paws offers Hemp Dog Treats in three formulas: Creamy Coconut (Restore), Roasted Peanut Butter (Calming) and Tasty Turmeric (Relief); each piece contains 5 mg of full spectrum CBD. Courtesy of Honest Paws.

**Grilled Ribeye Steak, Pan-Roasted True North Salmon** and **Grilled Chicken Breast**, which are all served with vegetables. **Sliced Apples, Heirloom Carrots** and **Mixed Berries** are lighter menu items offered. **Boris & Horton** in New York City is a neighborhood coffee shop that allows dogs and their pet owners to eat together. The space is divided into two distinct areas, a café side, with food and drink, and a “dog side,” with tables and dog-focused retail. There is also an outdoor walk-up window. London’s **Smith & Whistle** bar and restaurant offers “**Dogtails**,” a cocktail menu designed especially for dogs. The **Bow Wow Bubbly** is a “**Pawsecco**” herbal infusion with elderflower, linden blossom and ginseng, while the **Poochie Colada** is a mixture of kale, broccoli, and coconut water, and **Hound’s Hops** is a blend of specially brewed dog beer and fresh mint.

**Ollie’s Ice + Stuff**, an ice cream parlor for humans and their dogs, also opened its doors in May in Brooklyn’s Bushwick neighborhood in New York City. The shop offers “**Peanut Butter Pumpkin Butt**,” a dog-friendly ice-cream made of pumpkin puree, no-sugar peanut butter and a fat-free cashew yogurt. **Seattle Barkery** is Seattle’s first food truck for dogs, which serves **Peanut Butter Pumpkin Pretzels**, **Bacon Cupcakes** and **Duck Necks** for dogs.

## At Your Door

In today’s busy environment convenience is in ever higher demand as consumers’ desire for immediacy escalates. Delivery and subscription-based products and services are no longer reserved for humans; pets are now included. According to a Michelson Found Animals Foundation 2018 survey, almost four in 10 pet owners with a food subscription service say they have also signed up for a pet subscription service.<sup>3</sup> The **Farmer’s Dog** is a subscription-based pet food company that delivers crafted fresh pet food made from fresh

<sup>1</sup><https://www.wsj.com/articles/a-little-cbd-to-take-the-edge-off-for-your-pet-11557135001>



London's Smith & Whistle bar and restaurant offers "Dogtails," a cocktail menu designed especially for dogs, which includes the Bow Wow Bubbly "Pawsecco," Poochie Colada and Hound's Hops. Courtesy of Smith & Whistle.

ingredients such as carrots, turkey, parsnips, chickpeas, broccoli and spinach. According to the brand, the products have been tested on humans and is safe for owner consumption. The company offers various food plans via a customized profile for each dog based on breed, size, activity level and sensitivities. In January 2019, the brand closed \$39 million in Series B financing. **NomNomNow** is a similar home delivery service, which prepares cooked meals for dogs and cats weekly. The meals are made from fresh, restaurant-quality ingredients, individually vacuum sealed, portioned, tailored to meet specific nutrition needs and ready to serve with no preparation. Even fast food restaurants are catering to pets. As of part of a limited time DoorDash promotion, in November 2018, **Burger King** launched the **Dogpper**, a dog bone with BK's flame-grilled taste, which was delivered when a Whopper was ordered.

### Hospitality Industry Caters To Pets

Like restaurants and bars, hotels offer pet-friendly services. According to a 2018 Pet Travel Survey from GoPetFriendly.com, 12.5% of readers opt for a hotel in a pet-friendly city for their vacations and 47.9% of respondents stay at pet-friendly hotels for their accommodations.<sup>4</sup> Furthermore, according to the International Pet and Animal Transportation Association, more than 2 million pets and other live animals are transported by air every year in the

United States, more than 4 million worldwide.<sup>5</sup> In April 2019, Philadelphia's Center City's Rittenhouse Hotel added a pet menu to its room service. With a kitsch tagline "Bone Appétit!," the gourmet room service menu highlights five entrees: **Bark-Stew (Beef and Bean Stew with Vegetables)**, **Mutt'loaf (Turkey Meatloaf)**, **Mutt'za Balls (Organic Chicken and Brown Rice Balls)**, **Paw-sitively Delicious (Scottish Salmon, Spinach, Scrambled Eggs)** and **Some-Paw-dy Loves Me (Filet Mignon, Rice, Steamed Carrots)**. For dessert, dogs can have a **Pup'sicle (Frozen Peanut Butter Banana Bar)** and **Pup'puccino (Whipped Cream)**. In honor of National Ice Cream Day on July 21, 2019, PetSmart offered free dog-friendly ice cream topped with dog biscuit treats, at the chain's PetSmart stores with PetHotels on July 20 and July 21. These ice cream treats are normally reserved for pets staying overnight. According to Square, the financial transaction company, dog ice cream is steadily climbing from 2017-2018 with 55% more purchases<sup>6</sup>.

### Puppy Love

Pets, like children, are loved ones and an extension of pet owners. Research by GlobalData revealed that 56% of pet owners globally "somewhat

<sup>6</sup>[www.goodmorningamerica.com/food/story/scream-ice-cream-horchata-unicorn-top-trending-flavors-64247081](http://www.goodmorningamerica.com/food/story/scream-ice-cream-horchata-unicorn-top-trending-flavors-64247081)



The Farmer's Dog is a subscription-based pet food company that delivers crafted fresh pet food made from fresh ingredients such as carrots, turkey, parsnips, chickpeas, broccoli and spinach. Courtesy of The Farmer's Dog.

or completely agree” with the statement that their choice of pet products is a reflection of personal values and preferences<sup>v</sup>. As pet owners continue to pamper their pets, premium human lifestyle trends are manifesting and trickling down into pet food and pet services at a rapid pace. According to GfK, more than 4,500 new pet food products were introduced in 2017, which was a 45% increase from the year before<sup>w</sup>. Like all consumer packaged goods, brands and manufacturers are vying for consumers’

<sup>v</sup><https://animalpharm.agribusinessintelligence.informa.com/AP015006/BENEO-Consumer-trends-drive-pet-food-sector-development-globally>

<sup>w</sup><https://www.businessinsider.com/millennials-buy-high-end-pet-food-hurts-purina-kibbles-n-bits-2018-11>

attention and the pet food market is no exception. Driven by the overarching health and wellness trend, scrutinizing labels is the new norm and consumers continue to be increasingly selective about the ingredients that they use in their products and their pet products. Inspiration from human lifestyle trends combined with human-grade ingredients are creating opportunities and challenges for flavor suppliers and pet food brands alike.

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