

The tail wagging the dog: Is pet well-being driving innovation in SA's pet care market?

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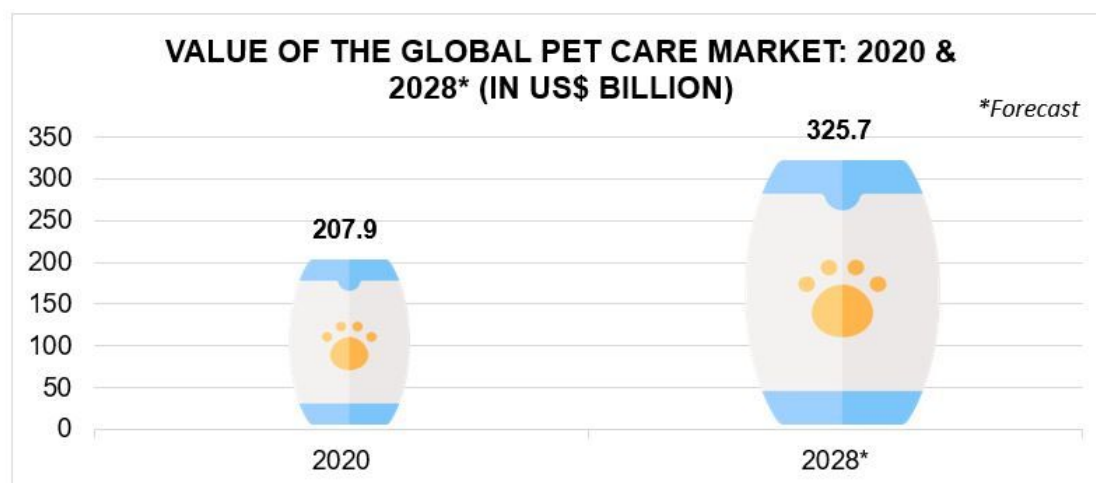
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Globally, Covid-19 lockdowns have accelerated rates of pet ownership, as consumers feel the emotional effects of restrictions and look to pets for companionship. As a result, consumers are also placing significantly more importance on the mental and physical well-being of their 'furry' children by investing in innovative products and services. This desire to better care for, and spoil their pets, is being driven by the increasingly popular trend of pet humanisation.



Insight Survey's latest SA Pet Care Industry Landscape Report 2021 carefully uncovers the global and local pet care market, based on the latest information and research. It describes the key global and local market trends, innovation and technology, drivers, and challenges, to present an objective insight into the South African pet care market environment, and its future.

Globally, the pet care market is expected to continue to experience strong growth in the next few years, with the total value of the market reaching approximately US\$207.9 billion in 2020. The market is forecast to grow at a compound annual growth rate (CAGR) of 5.6%, to reach approximately US\$325.7 billion in 2028, as illustrated in the graph below.



Source: [PRNewswire](#) Graphics by Insight Survey

In terms of the South African market, only marginal growth was experienced between 2019 and 2020, particularly due to

the negative economic impact of the Covid-19 pandemic. However, similar to the global market, the local market is also expected to recover, although at almost half of the global CAGR, to an estimated 2.2% between 2021 and 2025.

In the South African pet care market, growing numbers of pet-owning consumers are placing significantly greater emphasis on the mental and physical well-being of their pets, as the impact of Covid-19 accelerates the ongoing humanisation trend within the market. As a result, consumers are becoming more willing to spend more on their pets to ensure their continued health and well-being, much as they would for their own children, and even themselves.

In terms of health-focused pet food, one such example is that of the Botanicals by Gizzls product, which is a hand-baked dog treat range that incorporates adaptogens to promote overall well-being, as well as relief from common ailments. At the same time, Montego has expanded its Bags O'Wags treats range to include a Denties treat, which is designed to reduce tartar build-up in the mouth, and are made using nutritious ingredients, and come in various flavours and shapes.

Additionally, the inclusion of alternative proteins, such as plant-based and game meat proteins, is increasing in prominence as a means of avoiding allergens and encouraging a balanced diet. In response, Benevo and V-Dog have both introduced new plant-based protein alternatives, as part of their existing pet food portfolios.

The humanisation trend has also led to pet food that resemble human foods. For example, Hill's Pet Nutrition have introduced a series of recipes for treats and snacks that greatly resemble human food, but with ingredients that are not harmful to the animal. In addition, Cool Dogs Ice Cream have also recently started providing dog-friendly, lactose-free ice-cream in a variety of interesting flavours, such as Dazzlin' Duck, Swishin' Strawberry, and Blastin' Biltong.

In terms of the healthy administration of pet food products, Sure Petcare launched its now SUREFEED Microchip Pet Feeder Connect product. This product is designed for weight management and portion control amongst small dogs and cats, by incorporating weighing scales that allow for the accurate and precise portioning of pet food, depending on the size of the pet. Moreover, pet owners can make use of its app to monitor how often, and when, their pets eat, with an integrated microchip reader also ensuring that pets only consume specific meals.

Furthermore, consumers are also focused on promoting the mental health of their pets, particularly levels of anxiety, stress, and depression. This is resulting in the release of a variety of new products aimed at addressing pet mental health issues, with products containing cannabidiol (CBD) becoming particularly popular for this purpose. As an example of this, prominent CBD manufacturer, Africanpure CBD, has introduced a range of CBD oil products specifically designed for different breeds of dogs, aimed at reducing anxiety in pets, in addition to other health-related issues.

The South African Pet Care Industry Landscape Report 2021 (178 pages) provides a dynamic synthesis of industry research, examining the local and global pet care industry (including the impact of Covid-19) from a uniquely holistic perspective, with detailed insights into the entire value chain – market size, industry trends, latest innovation and technology, key drivers and challenges, pet care value chain overview (pet accessories, pet food suppliers, pet healthcare, and pet insurance providers), retail overview, and pricing analysis.

Some key questions the report will help you to answer:

- What are the current market dynamics of the global pet care industry?
- What are the key global and South African pet care industry trends, innovations and technology, drivers, and challenges?
- What are the market size value and volume trends in the SA pet care market (2015-2020) and forecasts (2021-2025), including the impact of Covid-19?
- Who are the key players in the South African pet care value chain in terms of pet food, pet accessories, pet insurance, and pet healthcare?
- What are the prices of popular pet care brands and products (dry dog food, dry cat food, wet dog food, wet cat food, dog treats, and cat treats) across SA retail outlets and supermarkets?

Please note that the 178-page report is available for purchase for R35,000.00 (excluding VAT). Alternatively, individual sections can be purchased for R15,000.00 (excluding VAT). For more information, please email info@insightsurvey.co.za or call our Cape Town office on (021) 045-0202 or Johannesburg office on (010) 140- 5756.

For more details and a full brochure: [South African Pet Care Industry Landscape Report 2021](#)

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We offer market research solutions to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal or external environment.

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